RightNow Web™ eService Center 5.0

A Better Way to Serve Your Customers

Customer Service Manual

For Microsoft Windows NT, 2000, and UNIX Operating Systems

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Preface

Welcome to RightNow Web eService Center 5.0 (eService Center 5.0), the first fully integrated Internet solution for customer service. Quick to install and easy to use, eService Center 5.0 provides unprecedented online customer service and support as it seamlessly routes your Web site visitors through self-service, automatic email inquiry and response, and Live chat support. Our customer support solution reduces human intervention in the support and service process, resulting in decreased costs and increased service speed and capacity for your business.

About this Manual

Whether you are new to eService Center 5.0 or already familiar with its capabilities, you will find useful information in this manual for providing quick and effective customer service. This manual is intended for the customer service representative (CSR) or any staff member responsible for servicing customer questions using eService Center 5.0.

Chapter 1, Executive Summary—Describes RightNow's three levels of customer service and additional components that make up RightNow Technologies' eService solution.

Chapter 2, Getting Started—Contains procedures for logging in to the administration area of eService Center 5.0 and changing personal settings. Also included is a sample workflow process from the time an incident is submitted by an end-user until a CSR solves the incident and proposes an answer.

Chapter 3, End-User Pages—Contains descriptions of the main components of eService Center 5.0 and the functions and features of the end-user pages. This chapter explains how the tasks end-users perform on the end-user pages affect CSRs. This includes searching for answers, logging in, accessing customer account information, requesting a Live chat session, and asking questions. Also included is a description of the search techniques available to end-users.

Chapter 4, Incident Console—Contains procedures for working with incidents, including viewing, editing, adding, and responding to incidents. This chapter also contains a description of RightNow's SmartSense™ emotive rating.

Chapter 5, Advanced Editing Features—Contains procedures for incorporating HTML code into incidents to create dynamic, well-formatted incident responses.

Chapter 6, RightNow Live—Contains procedures for responding to chat and phone requests using new chat management tools, including RightNow Live collaboration (co-browse), transfer, conference, and monitor. Also included are procedures for customizing agent settings and creating incidents from chat sessions.

Chapter 7, Views—Contains a discussion of how views can be individually customized based on each staff member's work needs and procedures for creating and editing views for the Incident and Customer Consoles.

Chapter 8, Customer Console—Contains procedures for viewing, adding, and updating customer and company records. Procedures for issuing contracts and creating incidents from the Customer Console are also included.

Conventions

As you read eService Center 5.0 documentation, you will notice the following conventions:

Example	Describes
Path: >Profiles> Edit	Identifies the path to access a page in RightNow, including any buttons or drop-down menus necessary to access a particular function. Paths appear immediately before the eService Center 5.0 page.
Configuration Editor>Settings>RNW Common> Modules>Support Contracts>SC_ENABLED	Identifies the submenus for configuration or message base settings accessed from the Configuration and Message Base Editors.
<angle brackets>	Indicates variable information specific to your RightNow applications.
New	Indicates a new feature in this release of RightNow.
Changed	Indicates a feature that has changed in this release of RightNow.

RightNow Technologies Documentation

RightNow documentation includes several manuals to help you install, administer, and use RightNow products including RightNow Web eService Center 5.0, RightNow Metrics™, and RightNow Locator™. This documentation is written for RightNow users who have a working knowledge of their operating system and Web browsers, and are familiar with standard conventions such as using menus and commands to open, save, and close files.

RightNow Web eService Center 5.0

The following documentation is available for RightNow Web eService Center 5.0.

RightNow Web eService Center 5.0 New Features and Enhancements—This document contains descriptions of the new features and enhancements of RightNow Web eService Center 5.0. This document is available in PDF format only.

RightNow Web eService Center 5.0 SmartConversion Guide—This guide contains procedures on upgrading RightNow Web 4.0.x to RightNow Web eService Center 5.0, including the necessary updates and the areas affected by the upgrade. Also included are procedures for customers hosted by RightNow Technologies on scheduling an upgrade time and evaluating your test site. This guide is available in PDF format only.

RightNow Web eService Center 5.0 Installation Guide—This guide contains procedures for installing and updating RightNow Web on Windows NT, Windows 2000, and UNIX platforms.

RightNow Web eService Center 5.0 Administration Manual—This manual contains descriptions of the phases of planning, configuration and customization, advanced configuration, and maintenance.

RightNow Web eService Center 5.0 Customer Service Manual—This manual contains information and procedures for customer service representatives on getting started, end-user interface functions and features, adding and editing incidents, using RightNow Live, and using the Customer Console.

RightNow Web eService Center 5.0 Reference Manual—This manual contains RightNow reference material, including descriptions of RightNow management and custom reports and instructions for generating a report. Also contained are procedures for modifying configuration settings using the Configuration Editor and descriptions of configuration settings, including default values; procedures on customizing text strings and buttons using the Message Base Editor, and procedures on modifying RightNow files using the File Manager.

RightNow Web eService Center 5.0 Integration Manual—This manual contains procedures for integrating eService Center 5.0's knowledge base with external systems, including help desks, data mining, and data reporting systems.

Click the online Help tab on the end-user pages for information about the end-user side of eService Center 5.0.

Click the online Help button on the Workflow Rules, Escalation Rules, and Reports pages of eService Center 5.0 for information specific to these features.

RightNow Metrics

RightNow Metrics can be used to efficiently conduct online research to measure customer satisfaction, monitor the effectiveness of your customer service department, and identify product and service enhancements. The following documentation is available for RightNow Metrics.

SmartStart™ Surveys—The SmartStart Surveys card contains valuable information about developing surveys using RightNow Metrics. It includes the steps necessary to plan your survey strategy and provides helpful tips for creating successful surveys.

RightNow Metrics Installation Guide—This guide contains procedures for installing RightNow Metrics, the survey and measurement tool that will help you keep your business activities on target.

RightNow Metrics User Guide—This guide contains procedures for successfully creating and executing e-mail and Web-based surveys.

Click the Help drop-down menu in RightNow Metrics to access the online help system.

RightNow Locator

RightNow Locator is RightNow Technologies' latest edition to its eService product line. RightNow Locator provides your customers with your organization's location information including contact information, mapping, and driving instructions. The following documentation is available for RightNow Locator.

RightNow Locator User Manual—This document contains procedures for configuring RightNow Locator to enable your customers to quickly find location information about your organization.

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Executive Summary

Today, companies are making investments in technology that help service representatives handle inquiries more efficiently. However, rather than reducing the inquiry load, service representatives can now simply process *more* inquiries. Constrained by fixed capacity with fixed resources, companies face incredible challenges dealing with unpredictable demands in customer service. Demand ebbs and flows and the existing customer service model produce two typical states: poor service because all agents are busy, or excess capacity with agents underutilized. Companies *must* find a solution to scale service capacity.

An ideal solution would provide customers with answers to their inquiries through a much lower cost channel—the Internet. If you could satisfy 80 to 90 percent of your customers' inquiries on your Web site, what would that do to your service operation?

- Service representatives would take only those inquiries that require human interaction; all other inquiries would be handled *up front* on your Web site.
- Customers would have immediate 24/7 access to information.
- Customers would easily obtain the information they need for a fraction of the cost.
- Your Web site would scale dynamically with normal business fluctuations.

This is exactly what RightNow Technologies' eService solution delivers.

Through our unique eService technology, RightNow Technologies has fundamentally changed the approach to satisfying customers in a service environment by reducing the initial inquiry burden and increasing service quality. This not only means a shift from high cost transactions to extremely low cost transactions, but also the ability to better manage shifts in demand.

Powered by our Revelation™ knowledge engine, the majority of your customers will find answers without assistance from a service representative. Customers who have unique or new questions can easily escalate to email, live chat, or collaboration. The customer-driven content of our knowledge base increases the success rate of customers finding answers on their own, while simultaneously lowering your cost of ownership with its ability to dynamically scale.

- Only RightNow uses every customer interaction to improve the quality of knowledge.
- Only RightNow can help you scale up your service capacity to meet demand.
- Only RightNow has self-learning knowledge base technology.

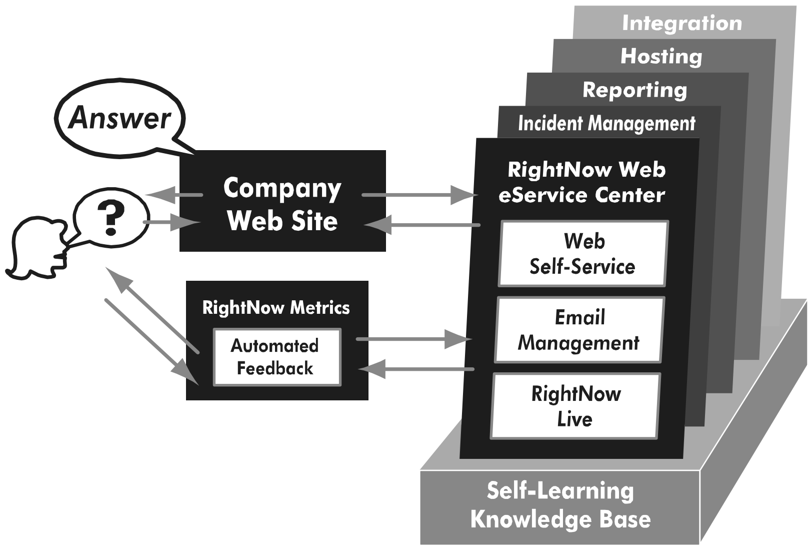


Figure 1-1: RightNow Web eService Center 5.0 Customer Service Solution

RightNow Web eService Center 5.0

Our complete eService platform seamlessly manages multi-channel customer interactions, whether through email, Web self-service, Web forms, live chat, or collaboration:

Self-service is at the heart of RightNow Web eService Center 5.0, providing the first, fastest, and most cost-effective way to answer the majority of customer inquiries. Easily accessed by your customers, self-service opens the door to immediate, accurate, and relevant answers to inquiries, while dramatically increasing your service responsiveness. As it eliminates repetitive calls and emails for service representatives, self-service reduces the costs associated with the majority of customer inquiries. And eService Center 5.0 organizes your site's answers so that customers can quickly zero in on the information they need, even as your knowledge base grows.

Broadening the definition of self-service, we have added RightNow Locator to our product line. Locator allows your customers to find location-specific information about your company. Whether it's a retail store, dealer outlet, or service center, RightNow Locator can provide your customers with a choice of locations, maps, and driving instructions. Just another way to give your customers what they're looking for.

Email response management provides a necessary escalation path from self-service for new or emerging issues. With RightNow Web eService Center 5.0, customers can submit questions via an email or Web form through your company's support site. Email response management automatically responds to incoming requests and intelligently routes questions to the appropriate person. And email management is linked with our SmartAssistant™ technology, which can be set up to automatically suggest answers for both the customer and the service representative. A seamless escalation path into your support center for new or unique issues is a critical component in your eService solution.

RightNow Live provides the highest level of online “touch,” allowing a personal one-to-one interaction with your customers. Live chat and collaboration via co-browsing can increase customer access points to your service organization. It allows agents to quickly assist customers who have questions or are struggling to complete a transaction. Live chat also improves customer confidence and retention—no more abandoned shopping carts due to customer frustration when filling out forms. And RightNow Live is tightly integrated with our self-learning knowledge base, capturing valuable information from chat sessions and providing yet another customer feedback path into the knowledge base.

These core elements make up RightNow’s self-learning knowledge base, the foundation on which our eService solution is built.

Revelation™ Knowledge Engine

We take a fundamentally different approach to knowledge management—our knowledge base learns with every customer interaction—so the most pertinent information is presented. Playing such an integral role, the knowledge base enables service representatives to quickly and consistently respond to Web inquiries, emails, and chats.

Driven by customer needs and ongoing dialog and feedback, this automatic generation of self-service content ensures that the information available to customers is the same information they are most interested in. The result is a more relevant and current knowledge base that costs dramatically less to administer and maintain.

To complete your customer service solution, RightNow Technologies provides you with an effective, ongoing customer feedback loop with customer surveys from RightNow Metrics and cross-channel reporting, both part of eService Center 5.0.

With tools integrated into RightNow, you can understand both your customers’ actions and attitudes, providing greater depth and understanding than you can gain from other systems.

With our Service Analytics tools, you will:

- Understand customers’ key questions, problems, and information needs with our reporting and analytical tools
- Understand customer attitudes, interests, and issues—in their own words—with the integrated survey functionality
- Spread this knowledge across your organization with powerful analysis, reporting, and distribution capabilities

Rounding out RightNow Technologies' eService solution are three components that provide you with additional tools for delivering superior customer service:

Business Rules Management—Powerful workflow and escalation rules allow you to define the conditions and subsequent actions for each incoming request. Customizable workflow rules can automate your responses, route inquiries, and eliminate the time-consuming task of processing inquiries. Rules route inquiries based on content, mood (using an emotive rating on keywords), or customer ranking. And RightNow's time-based workflow rules ensure a prompt response to all incoming requests, day or night. Workflow and escalation rules increase organizational efficiency, so you can realize higher customer satisfaction and manage workflow in ways that make the most sense for your business.

Hosting—RightNow's hosting services enable you to deploy RightNow Web eService Center 5.0 with virtually no impact on your staff or technical resources. Hosting allows swift implementation, security, scheduled backup, and 24/7 accessibility.

Integration—Integration is the final component of the customer service framework, providing the link to other applications throughout your organization. RightNow "connectors" link to other systems such as call center/help desk (Remedy, Vantive, and Quintus), shopping cart, Intershop, sales force automation (Onyx, Clarify), accounting, and marketing automation. Application bridges initiate information synchronization between RightNow and other systems.

In addition to standard integration, RightNow Web eService Center 5.0 also allows you to integrate with outside applications using cutting-edge XML language. Incident, answer, customer, and company data can be successfully shared when outside applications send XML-formatted emails to eService Center 5.0.

RightNow Web eService Center 5.0 unleashes the full power of the Internet while automating your customer service and lowering your operating costs. And because it is easy to implement and manage, you and your staff are free to pursue strategic goals.

If the power of the Internet is effectively applied to customer service, it can open up incredible opportunities for your business. Our eService solution provides all the support capacity you need for expanding your eService—right now.

Getting Started

As a customer service representative (CSR), your primary responsibility is to provide service and support to your customers. How you accomplish that depends on your company's business goals and the tools at your disposal. With RightNow Web eService Center 5.0, you have all the tools you need to provide complete, fast, and accurate customer service for the Web. It empowers your customers to find meaningful answers quickly and efficiently and provides you with an ideal platform for delivering superior customer service.

This chapter contains procedures for logging in for Windows NT/2000 and UNIX operating systems. (Procedures may vary depending on how your RightNow administrator has configured your site.) Also included in this chapter is an introduction to the administration interface you will work from and procedures for changing your personal settings, such as password and RightNow views.

But before you log in and begin using eService Center 5.0, take some time to look at the workflow process on the following pages. This process walks you through the life cycle of a customer inquiry beginning when the customer submits a question in RightNow. The process discussed here parallels the structure of this manual, which is your reference for all of the functions you will perform in eService Center 5.0.

Note: Details may vary depending on your specific application of RightNow.

Solving Customer Issues in eService Center 5.0

A typical CSR performs the following general duties:

- Finds solutions to questions and problems submitted by customers
- Manages and tracks unresolved questions and issues
- Responds to customers when their issues have been resolved
- Proposes that resolved issues be made available to other customers

Using the above as a general model of what you do on a daily basis, look at the sequence of events once a customer submits a question from the Ask a Question page in RightNow or through email. Each step in the process contains the tool in RightNow you will use to perform the function.

Customer submits a question:

The customer submits a question (called an "incident" in RightNow) either through email or from the Ask a Question page. The incident appears on the Incident Console. Email notifications alert CSRs when incidents are assigned to them and when a customer updates an incident.

Click  on any administration page to access the Incident Console.

You read the incident and begin to investigate:

Use any of the following tools to gather information about the customer's question. Access these tools from the Select Action drop-down menu on the Incident Console, the Editing Incident page, or the Incident Details page.

1. Access the customer record in the customer database.

Click **Customer Info.** to access details about the customer and the customer's associated company.

2. Review a list of the pages the customer viewed in RightNow before submitting the question. This option is available only when the customer submits the question through eService Center 5.0 (from the Ask a Question page).

Click **Session**.

3. Review a list of other incidents submitted by the customer. This record of incidents enables you to track both the customer's and company's issues to easily identify any unresolved incidents and their statuses. You can also quickly determine trends or problem areas for a customer and then tailor your support to address those issues.

Click **History**.

4. Ask SmartAssistant to suggest possible answers. RightNow's SmartAssistant can search the public knowledge base and suggest possible answers for the incident.

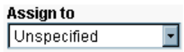
Click **Suggest Answers** on the Editing Incident page.

5. Search for similar incidents using various criteria, from a broad perspective using only a few criteria to a more narrow perspective using several criteria. Refer to “Searching for Specific Incidents” on page 4-9.

You then make an initial determination:

You can take any of the following actions to resolve the customer’s issue:

1. Re-assign the incident to another group or staff member. Incidents assigned to you could pertain to issues that are more appropriate for another group or staff member.

   Click 

 and select the appropriate staff member.

2. Track the issue over time for customer updates or new information from similar issues.

   Review the Discussion Thread section of the incident for customer updates and any notes or responses added by other CSRs.

3. Respond to the customer with an appropriate answer.

   Select 

. The response will be sent to the email address specified in the Contact Email field. The incident status type and status automatically change to Waiting, indicating that the incident has been responded to by a staff member.

Once the incident has been resolved:

Once an incident has been resolved, you can propose that the incident become a public answer so that it will be available to other customers from the Find Answers list on the end-user pages. In this way, your work can be captured in the knowledge base, which enhances the self-service benefits offered by eService Center 5.0 and reduces your workload.

On the Incident Console, select Propose from the Select Action drop-down menu next to the appropriate incident. The incident will be converted to a proposed answer, and your knowledge base engineer will determine if and when to publish the answer as well as who can view it from the end-user pages.

The steps listed in the workflow process are just a sample of the options available in eService Center 5.0 for solving customer issues and problems. RightNow also provides real-time, two-way dialog with customers when human intervention is required, and you may be responsible for receiving Live chat requests. You will also maintain your customer database by updating and adding customer and company information. This information can be used when working on incidents and for any mailings your company may send.

Logging in

To access the administration pages in eService Center 5.0, you must log in through the Administration Login page, which can be accessed through your Web browser via a uniform resource locator (URL).

To log in to eService Center 5.0:

1. Launch your Web browser and enter the following URL to open the Administration Login page:

Hosted by RightNow Technologies:

http://<your_interface>.custhelp.com/cgi-bin/
<your_interface>/login

UNIX (non-hosted):

http://<your_domain>/cgi-bin/<your_interface>/login

Windows NT/2000 (non-hosted):

http://<your_domain>/scripts/<your_interface>.exe/login

Path: Administration Site URL

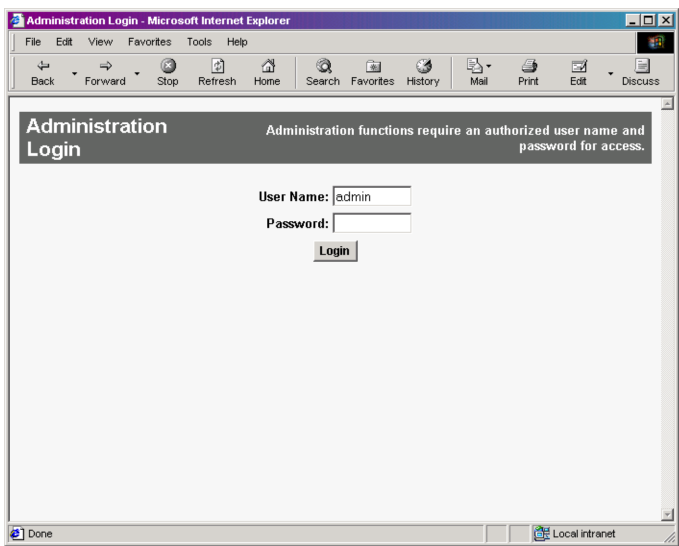


Figure 2-1: Administration Login Page

2. Type the user name and password assigned by your RightNow administrator.

If RightNow has been configured to remember user names and passwords (AL_REMEMBER_USERNAME_PASSWD is set to Yes), the Web browser prompts you to store your user name and password in a “cookie” that will be automatically entered in future sessions. (AL_COOKIE_EXP indicates how long the cookie should last if you have the Web browser remember.)

Note: Cookies must be enabled in your Web browser. Consult your Web browser documentation or manufacturer for specific information.

3. Click **Login** to open the Incident Console.

Path: Administration Login> **Login**

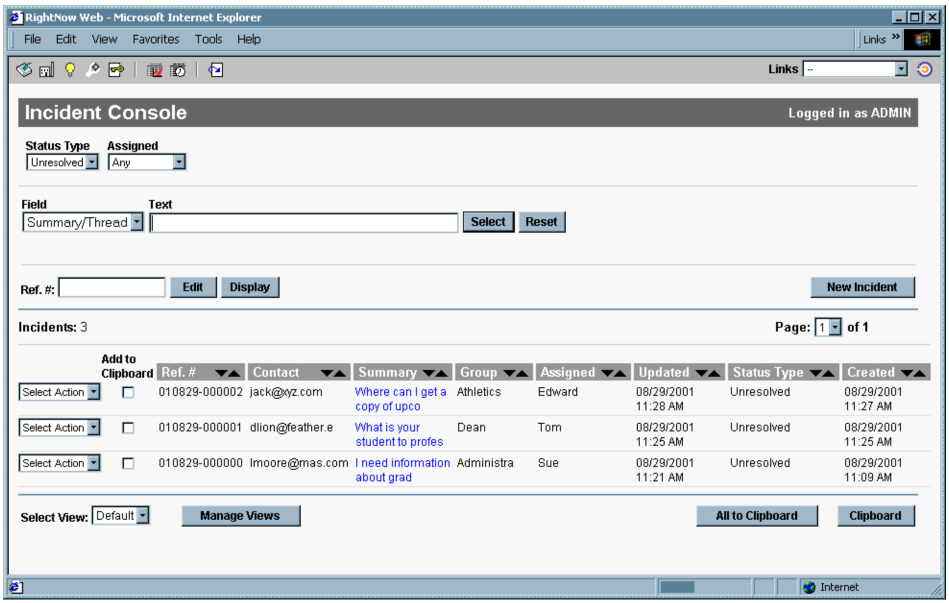


Figure 2-2: Incident Console—Default Start Page

Note: The Incident Console is the default start page; however, you can change the page that initially opens after you successfully log in. See “Changing Personal Settings” on page 2-7 for more information.

RightNow is divided into end-user pages and administration pages. Although you will work primarily from the administration pages, you can quickly move to the end-user pages by clicking the Links drop-down menu at the top of most administration pages. (Chapter 3, “End-User Pages,” contains an overview of RightNow from the end-user side.) Changed

The administration pages of RightNow have an intuitive layout and contain features that enable you to perform your job efficiently. And once you learn the basic procedures and features, you are ready to begin responding to incidents and resolving your customers’ issues. From the administration pages you can review unresolved incidents; add, edit, and respond to incidents; add and maintain customer information; and engage in Live chats with customers.


New

Icons have been added to the top of all administration pages making it easy to navigate between pages and functions. Click an icon to access that function. The new administration icons are identified in Table 2-1.

Table 2-1: Administration Pages Icons

Icon	Description
	Click the Incident Console icon to select incidents submitted by end-users, add new incidents to the knowledge base, and modify existing incidents. Refer to Chapter 4, "Incident Console."
	Click the Live Console icon to log in as a RightNow Live agent, monitor agents' chat sessions, and view a list of end-users in the wait queue. **Note: Your RightNow administrator must enable RightNow Live for the Live Console icon to appear. Refer to Chapter 6, "RightNow Live."**
	Click the Customer Console icon to add, update, and maintain customer information in the customer database. Refer to Chapter 8, "Customer Console."
	Click the Answer Console icon to access all public and private answers in the knowledge base. Refer to the *RightNow Web eService Center 5.0 Administration Manual*.
	Click the Management and Configuration icon to access the configuration options in RightNow. The options available on this page depend on your security profile. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for a description of the options available on this page.
	Click the Personal Settings icon to change settings for start page, password, and default views. Refer to "Changing Personal Settings" on page 2-7.
	Click the Reports Console icon to generate any system-defined management reports and create custom reports. For a description of each management report and information on using and generating reports, refer to the *RightNow Web eService Center 5.0 Reference Manual*.
	Click the Scheduled Reports icon to access report subscriptions. Refer to the *RightNow Web eService Center 5.0 Reference Manual*.
	Click the Refresh icon to refresh the screen.

Changing Personal Settings

Once you successfully log in, you will open the Incident Console. This is your default start page, but it can be changed if you work primarily from another page in eService Center 5.0.

New

To change your personal settings:

1. Click to open the Personal Settings page.

Path:

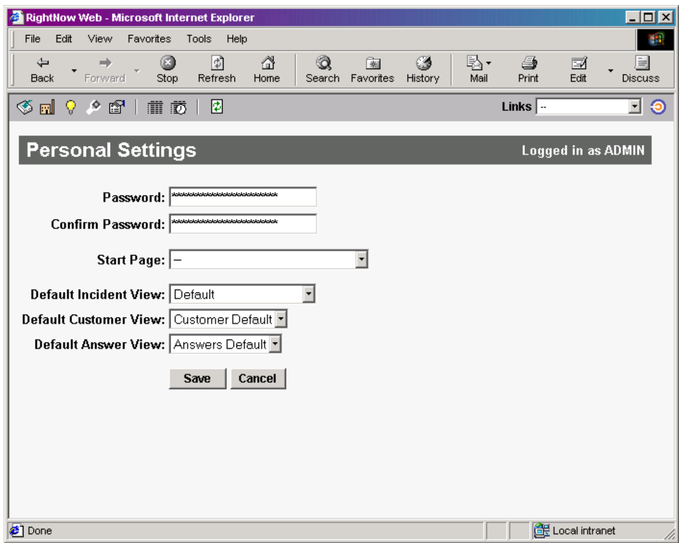


Figure 2-3: Personal Settings Page

2. Make the necessary changes and click Save.

Table 2-2 describes the options on the Personal Settings page.

Table 2-2: Personal Settings Page Field Descriptions

Field	Description
Password	Type the new password you will use to log in to eService Center 5.0. You must enter your password on the Administration Login page if your site is configured to require passwords.
Confirm Password	Re-type the new password to confirm.
Start Page	Click this drop-down menu to change the page that opens after you successfully log in. Options include Incident Console, Customer Console, Answer Console, and Management and Configuration.

Table 2-2: Personal Settings Page Field Descriptions (Continued)

Field	Description
Default Incident View	Click this drop-down menu to change your default view of the Incident Console. A view consists of the search criteria drop-down menus, the options in the Field drop-down menu, the sort order of incidents, the fields displayed, the width of the field displayed, and the number of incidents displayed per page. Refer to Chapter 7, “Incident and Customer Consoles Views.” **Note: This option will not appear on the Personal Settings page unless you have views privileges set in your security profile.**
Default Customer View	Click this drop-down menu to change your default Customer Console view. **Note: This option will not appear on the Personal Settings page unless you have views privileges set in your security profile.**
Default Answer View	Click this drop-down menu to change your default Answer Console view. **Note: This option will not appear on the Personal Settings page unless you have views privileges set in your security profile.**

For detailed information about security profiles, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

The next chapter contains an overview of the end-user pages and information on how end-users can navigate eService Center 5.0 to find the answers they need.

End-User Pages

End-user pages are those pages in RightNow Web eService Center 5.0 that your end-users can access. These pages contain powerful functions to assist end-users in solving problems and answering questions, and are completely customizable. As a customer service representative, you will be able to assist end-users more efficiently and quickly if you understand and become familiar with the end-user pages and the functions that can be performed from each page.

This chapter describes RightNow's main components and associated functions and features and shows you how end-users navigate RightNow to find the answers they need. Figure 3-1 shows the default Support Home page, the end-user's entry into eService Center 5.0.

Path: Support Site URL

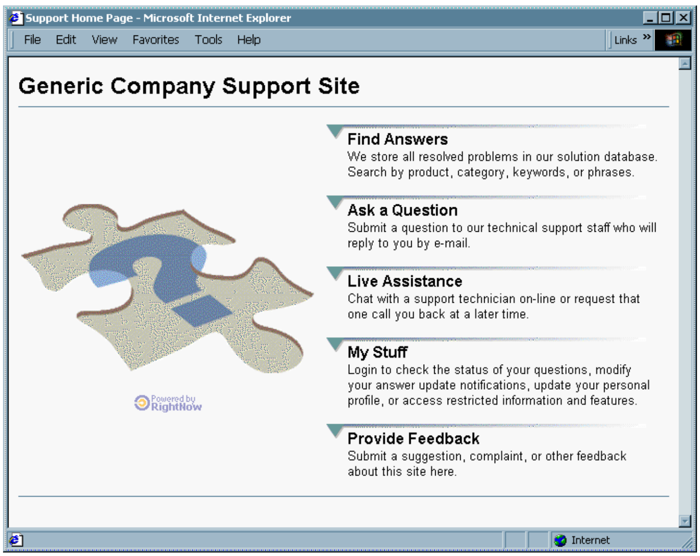


Figure 3-1: Support Home Page—End-User Entry Page

From the Support Home page, end-users can access the main components of RightNow, beginning with searching your knowledge base for answers to their questions. Depending on how the end-user pages have been configured by your RightNow administrator, end-users can perform any of the following functions from the end-user pages:

- Search the knowledge base for answers and view details of individual answers
- Submit a question to your support staff
- Submit a request for a real-time chat with your support staff
- Access their customer account information to view the questions they have previously submitted, submit new questions, and modify their user preferences and account and contact information
- Provide feedback on your Web site, products, and overall customer service

Key Terms

As you work with the end-user pages, you will want to become familiar with the key terms associated with the end-user side of RightNow Web eService Center 5.0.

Answer—On the administration side of RightNow Web eService Center 5.0, answers reside on the Answer Console and may be designated for viewing by end-users. On the end-user pages, answers that have been designated for viewing by end-users appear on the Find Answers and Answer pages. Answer also refers to any knowledge base information that provides solutions to common customer service questions.

Ask a Question—A link on the Support Home page that takes end-users to the Ask a Question page. End-users can submit questions to support staff if they cannot find an answer in the knowledge base. This component of RightNow is restricted and requires end-users to have a customer account.

Browse—A search method on the end-user pages that provides general topics end-users can choose from and then narrows to a specific answer; a search method that allows advanced users to view the topic clusters of the knowledge base to find their own answers.

End-user pages—All of the pages in RightNow Web eService Center 5.0 that end-users can access to look up answers, view their account information, submit a chat request, and ask a question.

Find Answers—A link on the Support Home page that takes end-users to the Find Answers page where they can search the knowledge base. Drop-down menus and the search text box enable end-users to narrow their search to find the answers they need. If enabled, end-users can also use Browse to search the knowledge base by topics. From the Find Answers page, end-users can click on an individual answer to view the complete details.

Live Assistance—A link on the Support Home page that takes end-users to the Live Assistance page where they can submit requests to chat with a RightNow Live agent or have an agent call them back. This component of RightNow Web eService Center 5.0 provides two-way, real-time chat and telephone callback for those companies that require a live support presence.

Login—A tab on the end-user pages that end-users can click to log in to ask a question, view and edit all of the questions they have submitted, view and edit their search preferences and account and contact information, and view Privileged Access answers.

My Stuff—A link on the Support Home page that takes end-users to their personal account information. From this area end-users can view and update all the questions that they have previously submitted and view any notifications for answers to which they are subscribed. They can also view and edit their search preferences and account and contact information. This component of RightNow is restricted and requires end-users to have a customer account.

Provide Feedback—A link on the Support Home page that enables end-users to submit feedback about an organization's Web site, customer service staff, product satisfaction, or any issue pertaining to an organization's Web site or customer service.

Related Answers—A function that aids end-users in finding solutions to questions related to the current session history. The Related Solutions page on the end-user pages displays answers sorted by relatedness to the individual's question—those answers that appear at the top of the list are most related to the last answer the end-user viewed before clicking the Related button.

Restricted Functions—Those end-user functions in RightNow Web eService Center 5.0 that require a valid account (user ID and password) to access. End-users must have a customer account to ask a question and to access My Stuff and Privileged Access answers.

Score—A calculated value equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu on the Add New Answer page or Edit Answer page.

Support Home—The support central page that contains links leading to the main components in RightNow Web eService Center 5.0. This page provides end-users with quick access to the tools they need to answer their questions and receive immediate customer service.

Weight—A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search.

Configuring End-User Pages

The end-user pages are completely customizable and can be configured to reflect your organization's customer service objectives. Your RightNow administrator can configure the end-user pages to include or exclude functions and features and incorporate your company's color scheme, graphics, products, and categories.

While listing specific configuration settings is beyond the scope of this chapter, you will benefit from a general understanding of the configuration options available. A sample of how the end-user pages can be customized is listed here.

Support Home

- Display announcements to your Web site visitors
- Enable and disable the main components in eService Center 5.0
- Disable the Support Home page and route Web site visitors to another page
- Add additional links for product extensions
- Enable password required to access the Support Home page

Find Answers

- Configure the Product and Category drop-down menus, the options in the Search By drop-down menu, the answer fields that are displayed, and how your answers are sorted
- Determine how much information to supply to end-users when viewing an answer
- Specify which actions will be available to end-users when viewing an answer (allow end-users to print an answer, email an answer, and provide feedback on the usefulness of an answer)
- Configure the Related Answers feature to display answers related to the answer being viewed

Ask a Question

- Require end-users to search your knowledge base before asking a question
- Require end-users to provide information about themselves before they can submit questions
- Specify whether end-users can submit file attachments with their questions
- Set up workflow rules to supply automatic preliminary responses to end-users' questions

Live Assistance

- Enable RightNow Live so end-users can request a Live chat, a callback request, or both
- Route end-users to another Web site when Live agents are unavailable
- Prepare standard responses that agents can use when engaged in a chat
- Define standard URLs that agents can push to end-users

My Stuff

- Configure end-user settings, including allowing end-users to log in and access the questions they have submitted and to subscribe to certain answers
- Allow end-users to customize certain settings on the Find Answers page when searching your knowledge base

Login

- Allow customer accounts to be created by end-users or force end-users to log in with an existing customer ID / password combination
- Specify what information end-users must supply when creating an account
- Enable the Contracts module to restrict the number of questions an end-user may ask

Note: Refer to the *RightNow Web eService Center 5.0 Administration Manual* for complete configuration and customization procedures.

Depending on how your RightNow administrator has configured your site, the end-user pages may look and function differently than those shown and explained throughout this chapter.

Before you explore the options available to your end-users, take a look at the RightNow interface from the end-user's perspective. Figure 3-2 shows the tasks end-users can perform from each of the main components as well as the path they will follow navigating your organization's Web site.

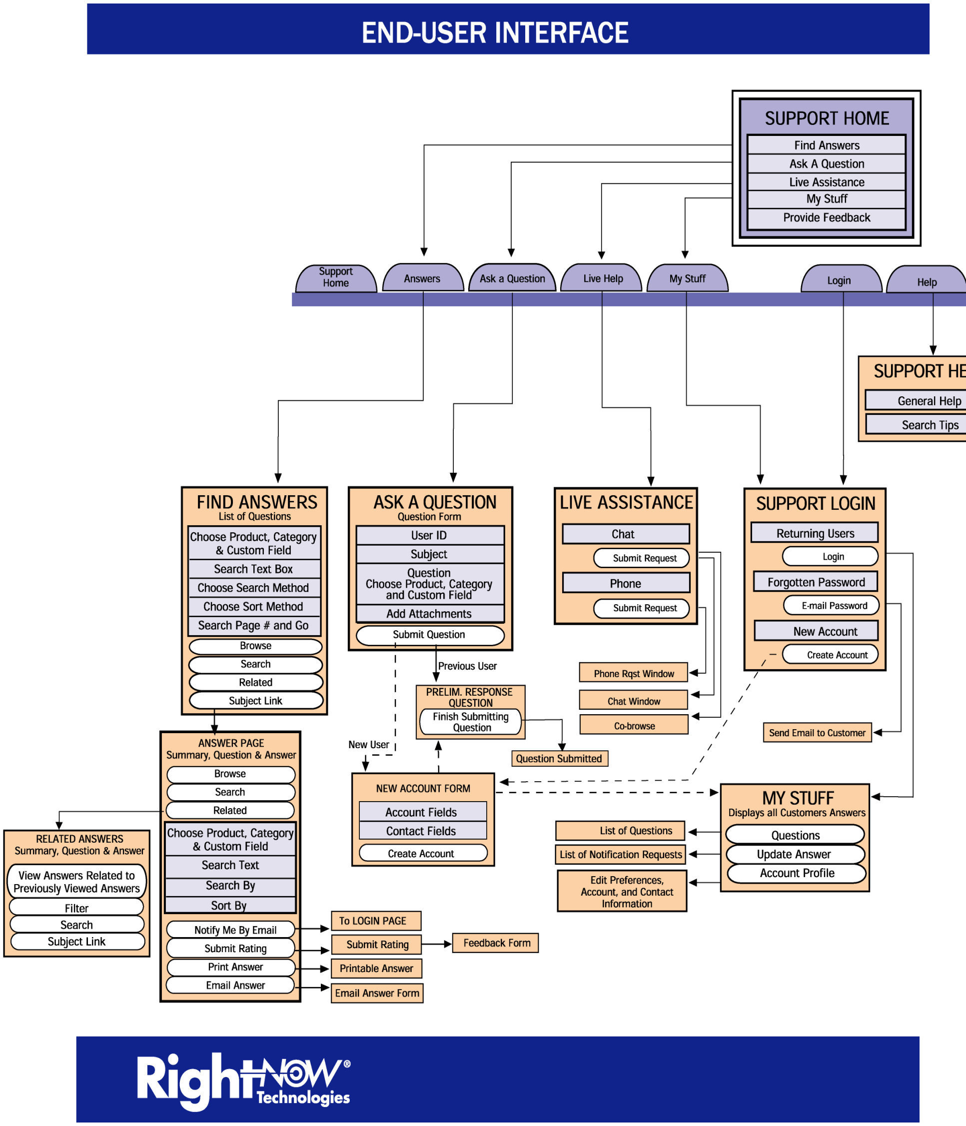


Figure 3-2: RightNow Web eService Center 5.0 End-User Interface

Accessing End-User Pages

You can access the end-user pages by typing the uniform resource locator (URL) of your Support Home page in a Web browser.

To access the end-user pages from a Web browser:

Launch your Web browser and enter the following URL:

Hosted by RightNow Technologies:

```
http://<your_interface>.custhelp.com
```

UNIX (non-hosted):

```
http://<your_domain>/cgi-bin/<your_interface>.cfg/php/
enduser/home.php
```

Windows NT/2000 (non-hosted):

```
http://<your_domain>/scripts/<your_interface>.cfg/php.exe/
enduser/home.php
```

To access the end-user pages from the administration side:

New

You can access the end-user pages from the administration side of RightNow by clicking the Links drop-down menu at the top of most administration pages and selecting End-User Interface.

Support Home Page

The Support Home page is your company's support central site containing links to the main components of RightNow. This page provides end-users with quick access to the tools they need to answer their questions and receive immediate customer service.

By default, the Support Home page contains links to Find Answers, Ask a Question, My Stuff, and Provide Feedback. (Your RightNow administrator must enable RightNow Live for the Live Assistance link to appear.) If your administrator disables the Support Home page, the next available page will open (usually the Find Answers page).

Path: Support Site URL

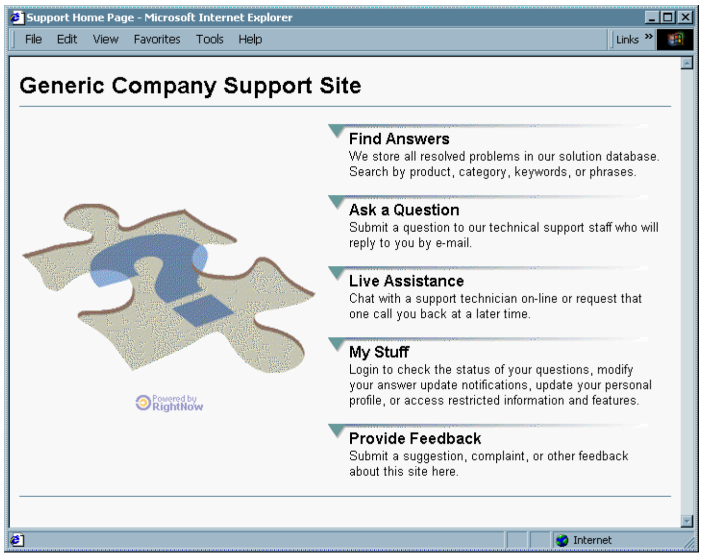


Figure 3-3: Support Home Page—End-User Entry Page

When an end-user clicks one of the links, the appropriate page will open within the user interface. Click the **Find Answers** link now.

Path: Support Home>Find Answers

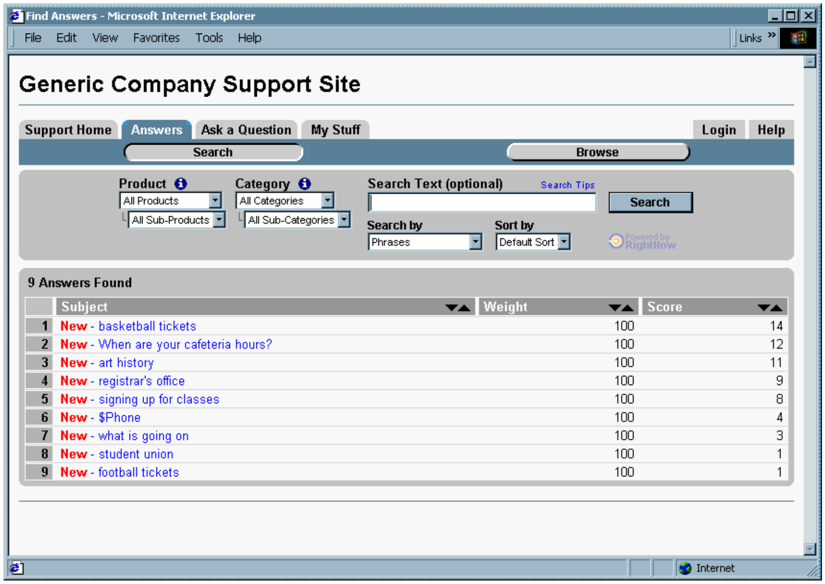


Figure 3-4: Find Answers Page

Once your end-users access the interface, they will see a navigation bar containing tabs that link to the main components in RightNow. The navigation bar displays on most pages and enables end-users to quickly navigate the product and also serves as a locator.

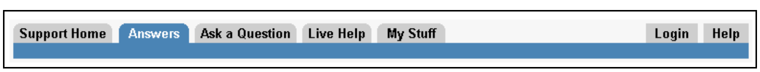


Figure 3-5: RightNow Web eService Center 5.0 Navigation Bar

The navigation bar also contains tabs for logging in and for help. The Help tab contains general information about the end-user pages; the Login tab takes end-users to the Support Login page where they can log in to access restricted functions. Restricted functions and the RightNow login feature are described in the next section.

Note: The Provide Feedback link appears only on the Support Home page.

End-User Security and Login

End-users can quickly access the knowledge base to assist them in finding the information they need, and some end-users will never do more than search your knowledge base; however, some may require more personalized service. For those end-users, RightNow allows access to restricted functions once they have a valid customer account with your organization.

Note: Your RightNow administrator can configure eService Center 5.0 so that end-users can create customer accounts, or they can restrict this function to CSRs and administrators. In addition, eService Center 5.0 creates a customer account when an end-user requests a Live chat or a callback request. Your RightNow administrator can also disable this feature. For more information on restricting who can create customer accounts, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Once end-users have a valid account, they can log in to submit a question, track the questions they have previously submitted, access their account information and make updates, and view Privileged Access answers. And the RightNow login feature enables you to control and track who accesses your Web site and maintain an up-to-date customer database.

This section describes the restricted areas in RightNow and how your end-users can create customer accounts. End-users must log in to perform the following functions:

- Ask a question
- Access My Stuff
- View Privileged Access answers

The next section describes the login feature in more detail and includes information about creating a customer account.

Accessing Restricted Functions

When end-users request access to restricted functions (for example, when they click **My Stuff** on the Support Home page), they will open the Support Login page.

Path: Support Home>My Stuff

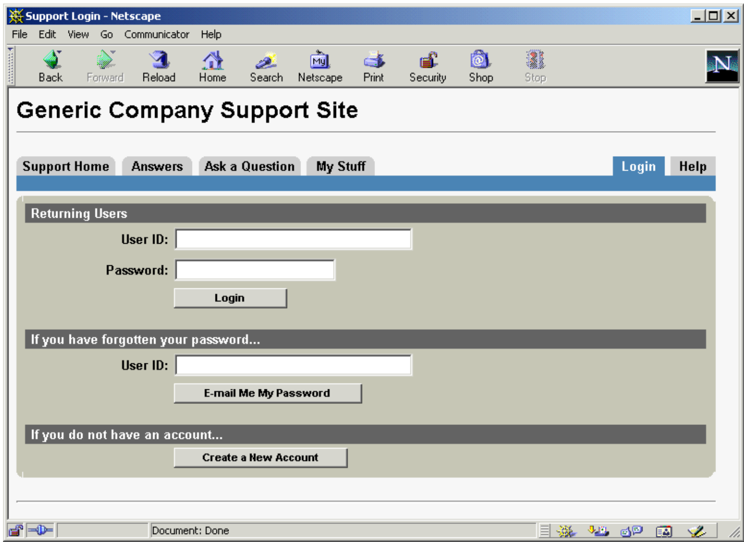


Figure 3-6: Support Login Page

By default, end-users have three options from the Support Login page:

- Type their user ID and password to log in
- Have their password emailed to them if they have forgotten it
- Create a new account if they do not have one

Returning users—Returning end-users type their user ID and password to access the restricted functions. By default, end-users who have previously submitted questions can log in by typing just their user ID. Their password defaults to the password used in the previous session (see Figure 3-19, “Ask a Question Page,” on page 3-37).

If you have forgotten your password—Returning end-users who do not remember their password can enter their user ID and click **Email Me My Password** to have their password sent to them through email.

If you do not have an account—For end-users who do not have a valid customer account, they can create an account to access restricted functions in RightNow. In the next section, you will see how end-users create an account, assuming that RightNow has been configured to allow end-users to create customer accounts.

Note: If your administrator has configured RightNow to prevent end-users from creating customer accounts, this section will not appear on the Support Login page.

Creating an Account

End-users click **Create a New Account** on the Support Login page to create an account.

Path: Support Login> **Create a New Account**

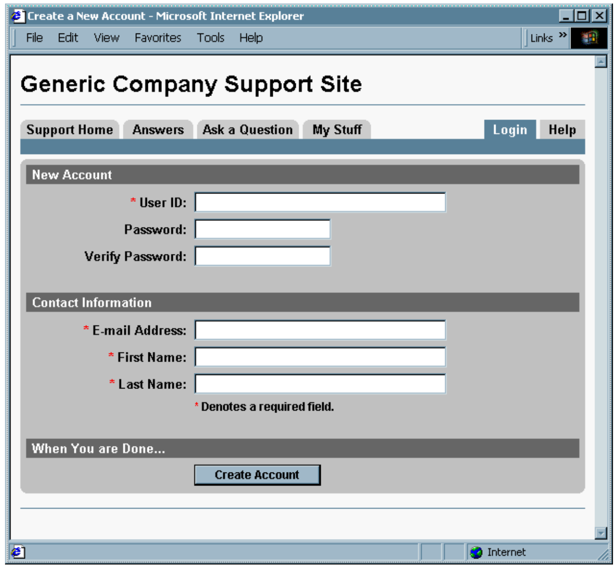


Figure 3-7: Create a New Account Page

In the default configuration, the Create a New Account page prompts the end-user for a user ID and password, email address, and first and last name. In addition, any customer custom or company custom fields that have end-user visibility will also be displayed on this page (refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information).

Fields with an asterisk (*) indicate required fields and *must* be filled in. If an end-user does not fill in all required fields and clicks **Create Account**, a warning box will display those required field(s) that were not completed.

Note: Your RightNow administrator can configure the fields displayed on this page.

Customer and Company Records

In eService Center 5.0, customer records are based on the user ID. A new customer record is created for each unique user ID. The ID can be an email address, name, or any combination of numbers and characters; however, the ID cannot contain spaces or double quotes.

When creating accounts, end-users have the option to be associated with an existing company in the RightNow database. This allows end-users to view the questions submitted by other end-users associated with their company (through My Stuff) and to view Privileged Access answers. Associating customers with companies allows you to group end-users under a company “umbrella.”

To be associated with a company, end-users must provide the company ID and the password associated with the company. The default for the company ID will be the company domain name (for example, rightnow.com). If the end-user types an incorrect company ID / password combination, an error will be generated. The end-user can retype the company ID and password. If the end-user again enters an incorrect ID and password, they will not be associated with the company. End-users also have the option to leave the company ID and password fields blank, in which case they will not be associated with a company. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Note: To access Privileged Access answers, end-users must be associated with a company and have an access level defined in their customer record for Privileged Access answers. Then, when end-users log in and access the Answer page, the privileged access answers will be displayed. For more information on Privileged Access and companies, refer to “Associating Customers with Companies” on page 8-12.

After Logging In

After end-users successfully log in, the page they initially tried to access will open. For example, if the end-user clicks **My Stuff** and enters a valid user ID and password, the My Stuff page will open. Likewise, if the end-user clicks **Ask a Question** and enters a valid user ID, the Ask a Question page will open. The exception is when the end-user clicks **Find Answers** on the Support Home page and then clicks **Login.** After entering a valid user ID and password, the My Stuff page will open.

End-users need to log in only once per session. For example, if an end-user logs in to My Stuff to view their questions or to change their profile information, they will not need to log in a second time to ask a question, provided that their Web browser's cookie functionality is turned on. If the cookie functionality is turned off, the end-user must log in again whenever the session ID changes (for example, if the end-user closes the Web browser or accesses a different Web site).

The remainder of this chapter describes the options available to end-users from the Support Home page, beginning with the Find Answers option.

Find Answers

The Find Answers component in RightNow enables end-users to search your knowledge base for answers to their questions. As the first level of your customer support, Find Answers provides end-users with immediate answers and reduces your workload and your organization's operating costs.

When end-users click the **Find Answers** link or the **Answers** tab, a list of the most frequently viewed answers in your knowledge base will be displayed.

Path: Support Home>Find Answers

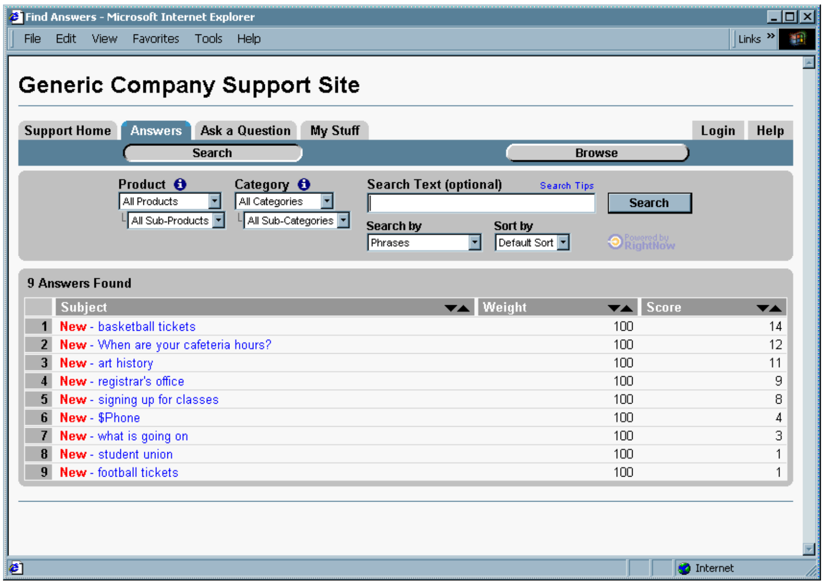


Figure 3-8: Find Answers Page

In the default configuration, the Find Answers page displays a list of answers sorted by weight and score. The example shown in Figure 3-8 is a common configuration where both products and categories have been added as well as Weight and Score display fields. The Weight and Score fields are *not* displayed in the default configuration. Your RightNow administrator can edit the view for this page to configure the drop-down menus, the options in the Search By drop-down menu, the columns that display the answers, and how the answers are sorted.

Note: Weight is a displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search. Score is a calculated value equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu on the Add New Answer or Edit Answer pages. For information about this drop-down menu, refer to the *RightNow Web eService 5.0 Administration Manual*; for more information on score, refer to "Solved Count and Score" on page 3-33.

Table 3-1 contains descriptions of the fields and buttons on the Find Answers page.

Table 3-1: Find Answers Page Field Descriptions

Field	Descriptions
Product All Products	This drop-down menu contains all the products that have been specified. If your company has more than one RightNow interface, only the products that have visibility on this interface will be displayed. **Note: End-users can click the information icon above the Products drop-down menu to display the products hierarchy in a separate window. (A description of each product is also included.) End-users can then click a product in the hierarchy list and RightNow will return the search results for that product on the Find Answers page.**
All Sub-Products	This drop-down menu contains all the sub-products for the products contained in the Product drop-down menu.
Category All Categories	This drop-down menu contains all the categories that have been specified. If your company has more than one RightNow interface, only the categories that have visibility on this interface will be displayed. **Note: End-users can click the information icon above the Category drop-down menu to display the category hierarchy in a separate window. (A description of each category is also included.) End-users can then click a category in the hierarchy list and RightNow will return the search results for that category on the Find Answers page.**
All Sub-Categories	This drop-down menu contains all the categories for the categories contained in the Category drop-down menu.
Search Text (optional)	End-users can enter the text they want to search for in this text box. Text is not required to run a search.
Search	This button activates all searches whether the end-user is using the drop-down menus or text to search.
Search Tips	Clicking this link will open a help file that explains the options in the Search By drop-down menu and explains how to run effective searches.
Search by Phrases	This drop-down menu specifies the search criteria to be used in the search. There are four options: Phrases, Similar Phrases, Exact Phrases, and Complex Expression. Each option uses a different searching technique. For more information, refer to "Search Techniques" on page 3-19. **Note: Your RightNow administrator can change the options in the drop-down menu by editing the Search page view. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual.***

Table 3-1: Find Answers Page Field Descriptions (Continued)

Field	Descriptions
Sort by Default Sort	This drop-down menu specifies how the answers are sorted. The default options are Default Sort and Subject. For example, if the end-user chooses subject, the questions will be displayed in alphabetical order by their subject. The default sort is the sort defined by your RightNow administrator in the end-user pages Search view. **Note: The options in the drop-down menu are determined by the fields that are displayed in the list of answers. Your RightNow administrator can change the display fields by editing the Search page view. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.**
Page: 1	This drop-down menu specifies the current page. To move to another page, select the page number and click Go. **Note: The drop-down menu and button will be present only when you have more than one page of answers.**
◀ ▶	These arrows are used to navigate forward and back one page at a time.
▲	This arrow sorts the answers in ascending order (A to Z).
▼	This arrow sorts the answers in descending order (Z to A).
Subject	This column displays the answer summary. On the end-user pages, the answer summary is called the *subject*.
Weight	This field displays the value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search.
Score	This field displays the calculated value that is equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu on the Add New Answer or Edit Answer pages. For more information on solved count, refer to "Solved Count and Score" on page 3-33.

Navigating Find Answers

As end-users move through the Find Answers component of RightNow, they will access three main pages in the interface, all of which contain specific functions. A list of the pages and corresponding functions follows.

Note: Remember that the functions available on your site depend on how your RightNow administrator has configured your site; not all of the functions listed here may be available to your end-users.

Find Answers page:

1. View the list of answers in your knowledge base
2. Search the knowledge base using powerful search techniques or the new Browse feature (“Searching the Knowledge Base” on page 3-19)
3. Click the subject link of a specific answer to view that answer’s details

Answer page:

1. View the details of an answer (“Viewing Answers” on page 3-25)
2. Subscribe to be notified when the answer is updated
3. Print the answer
4. Email the answer to someone
5. Rate the usefulness of the answer
6. Ask RightNow to recommend other solutions related to the current answer

Related Answers page:

1. View the list of related answers (“Viewing Related Answers” on page 3-34)
2. Select a previously viewed answer and ask for related answers
3. Click a subject link to view a specific related answer

Now that you have a general idea of the options available to end-users and what pages they access to perform specific functions, we will move to an overview of the search techniques available in eService Center 5.0. Your end-users can access online information about searching the knowledge base by clicking the **Search Tips** link on the Find Answers page.

Searching the Knowledge Base

RightNow has four search techniques for running queries: natural language, similar search, exact search, and complex search. The Search By drop-down menu on the Find Answers page enables the end-user to choose which search technique they want to use when searching for answers. Each of the four search techniques correlate with the options in the Search By drop-down menu (Phrases, Similar Phrases, Exact Phrases, and Complex Expression). They can also sort the resulting answers using the default sort or by the Subject field.

The following section provides background information for effectively using each technique.

Search Techniques

All search techniques search against a list of words and phrases that is indexed from each answer in RightNow. The list of indexed words and phrases is created from each answer by first extracting all the stop words from the answer, then taking each individual word, each pair of words, and each triple of words. Stop words are common words in a language such as *a, an, the.*

Once each word or phrase is identified within the answer, a stemming algorithm is applied before storing them in the index. In eService Center 5.0, stemming is used for all supported languages except Finnish, due to the particular conditions of that language. Finally, each word or phrase in the index is assigned a weight based on the number of occurrences of that word within the answer. Each occurrence is weighted for importance by its location: in the summary or heading, the description, or the body of the answer.

Word Stemming—All of the search techniques in eService Center 5.0 use “stemmed words.” In most languages, every root word will have a different form depending on the tense, such as singular or plural, or past, present, and future. Each word that is indexed or searched for in RightNow is stemmed, leaving just the root instead of the whole word. In this way, substantial space is saved while simultaneously making the search broader and more appropriate. For example, the words *reflection, reflections, reflected, reflecting,* and *reflects* all have *reflect* as the root word. All of these words would be stored as *reflect* in the database. Therefore, storing the word in the stemmed form is obviously useful because it takes less storage space and searching will be more efficient.

Words are stemmed in RightNow using the Portal algorithm. In eService Center 5.0, we support Dutch, English, Spanish, Italian, French, Greek, German, and Portuguese word stemming. The Finnish language does not have a readily available stemming algorithm due to the nature of that language.

Logical operators—All search techniques in RightNow, except exact phrases, support logical operators. These operators are the words and symbols, AND (+) and NOT (-), that can be used to explicitly find answers that have a word (+) or that do not have a word (-).

Phrases

In this search technique, the end-user types a phrase or a question to search the knowledge base, and those answers that match the condition are returned. The match between answers and search text is based on the similarity with the answer keywords and phrases as determined by the word and phrase weights. Word stemming and logical operators are supported in this search technique.

Similar Phrases

In this search technique, a list of similar words is generated from the words or phrases entered by the end-user. This new word list is generated from synonyms or similarly spelled words. Two steps are performed for searching in English, while only one step is used for the other supported languages. Word stemming and logical operators are supported in this search technique.

English—For the English language similar search, the words and the phrases that are entered by the end-user are first checked for correct spelling. If the words are spelled correctly, a list of synonyms is generated for each word, and the search is performed using this synonym list. If a word is not spelled correctly, the spell checker generates ten suggested words for the incorrectly spelled word. Then, a list of synonyms for each suggested word is generated, and the search is performed using this list.

Other Languages—For languages other than English, the above approach for spelling correction is used, but no synonym expansion is performed.

Exact Phrases

In this search technique, answers with the same pattern of words are matched and displayed to the end-user. The pattern in the returned answers may be different from the search text in the sense that the returned answers will have the same sequence of stemmed words, but these stemmed words may be separated by one or more stop words. Exact search is the only search technique in RightNow that does not support the logical operators.

Complex Expression

This search technique is the only technique that supports wildcard searching, which enables end-users to search for phrases and words they are not completely familiar with. The wildcard is the “*” character, which translates to “anything may appear here.” The wildcard character may appear only at the end of a word or partial word. Word stemming and logical operators are supported in this search technique.

Browse

New

In addition to the standard search method, your site may be configured so that end-users can search using Browse. This search method provides a new view into your knowledge base and can be especially effective for those end-users who do not know the exact terminology to conduct a standard search. Browse can be configured as a single- or multi-level view; the views differ in presentation only, not in content. Your RightNow administrator will determine the most effective option for your RightNow application.

In Browse, answers are grouped based on keywords, products, sub-products, categories, subcategories, and noun phrases in the Summary and Question fields. Grouping is done in the background by the utility *agedatabase;* when *agedatabase* runs, it regroups answers based on updates to your knowledge base. A description of the two options in Browse follows.

Note: If you are upgrading from a previous version of RightNow, Browse is disabled; for new customers, Browse is, by default, enabled. Grouping (clustering) takes place even if this feature is disabled.

Browse with the Single-Level View

This option assists end-users in finding answers by providing general topics they can choose from and then narrowing to a specific answer. This option is designed for novice users who prefer to be guided through their search. Each page displays two to nine topics, and end-users can choose the topic that best describes their questions. The first page offers the most general topics.

Path: Find Answers> Browse ***(Single-Level View)***

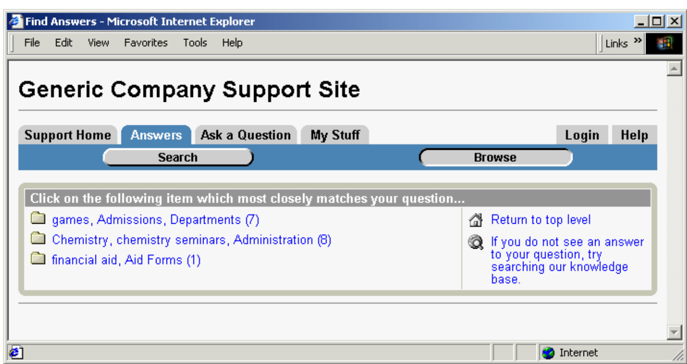


Figure 3-9: Single-Level View in Browse

When an end-user clicks a topic, a new page opens that displays several more related topics.

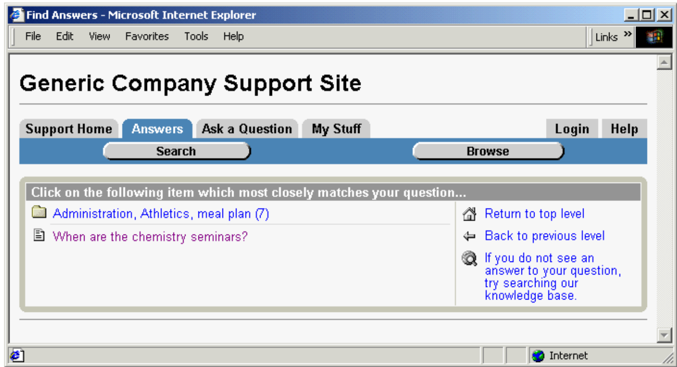


Figure 3-10: Second Layer of Browse with the Single-Level View

The topics displayed originate from the tree-based hierarchy of the knowledge base. When a public answer is created, it is parsed for phrases and keywords and then grouped with similar answers in the knowledge base in a process known as clustering. Effectively, the knowledge base is split into bins containing similar answers, and these bins are linked to each other to create a tree-based hierarchy.

Each subsequent page displays more specific choices based on previously selected topics. At any point, the end-user can display the text of a specific answer or continue choosing topics to narrow the search.

As end-users choose topics, their view of the knowledge base narrows; in this way, they are presented with only the immediate groupings of information related to their topic, not the entire knowledge base as with the multi-level browse view (see “Browse with the Multi-Level View” on page 3-23). Icons on the right side of the page allow end-users to return to the top of the list or the previous list, or to conduct a standard search.

Browse with the Multi-Level View

This option provides end-users with a graphical interface similar to a file management system. End-users can navigate the knowledge base tree hierarchy to find answers. This search is designed for advanced end-users who know what they are looking for and want the freedom to view the topic clusters of the knowledge base to find their own answers.

Path: Find Answers> Browse ***(Multi-Level View)***

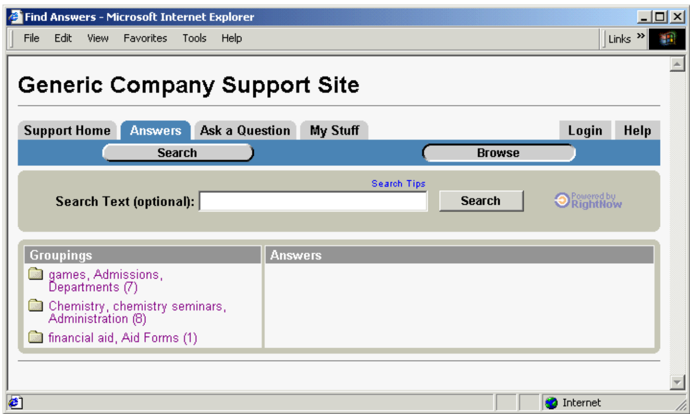


Figure 3-11: Browse with the Multi-Level View

When the end-user clicks a folder, the files and folders in that branch or cluster will be displayed. The end-user can follow a branch by clicking a subordinate folder or view a specific answer by clicking a file.

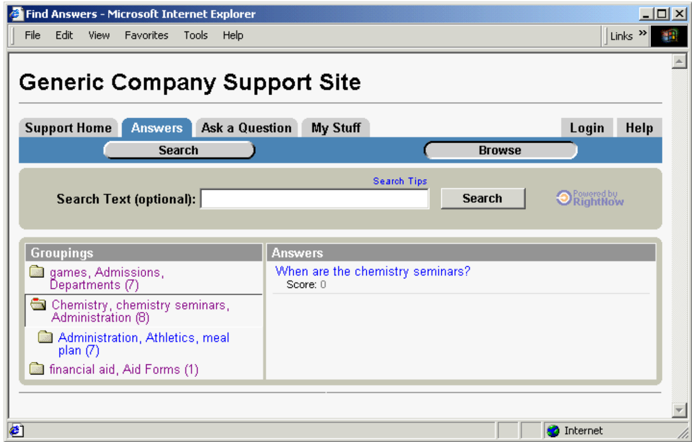


Figure 3-12: Second Layer of Browse with the Multi-Level View

The Browse page is divided into two columns:

Groupings—Displays the topic clusters (represented by folder icons) and individual answers (represented by file icons). The number of answers in each topic cluster is listed in parentheses.

Answers—Displays the answer summary plus the answer score (refer to "Solved Count and Score" on page 3-33).

When end-users open a folder to see the subordinate folders and answers, the top-level folders remain visible. This enables end-users to view the entire knowledge base at the same time they narrow and focus toward a single answer.

End-users can also search the knowledge base while in the multi-level view. Search results are returned in clusters, and each cluster returned will have at least one answer that contains the text the end-user searched for. Searching is done using natural language processing.

Viewing Answers

Once end-users find a possible answer to their question, they can view the details of the answer by clicking in the subject link on the Find Answers page.

Path: Support Home>Find Answers

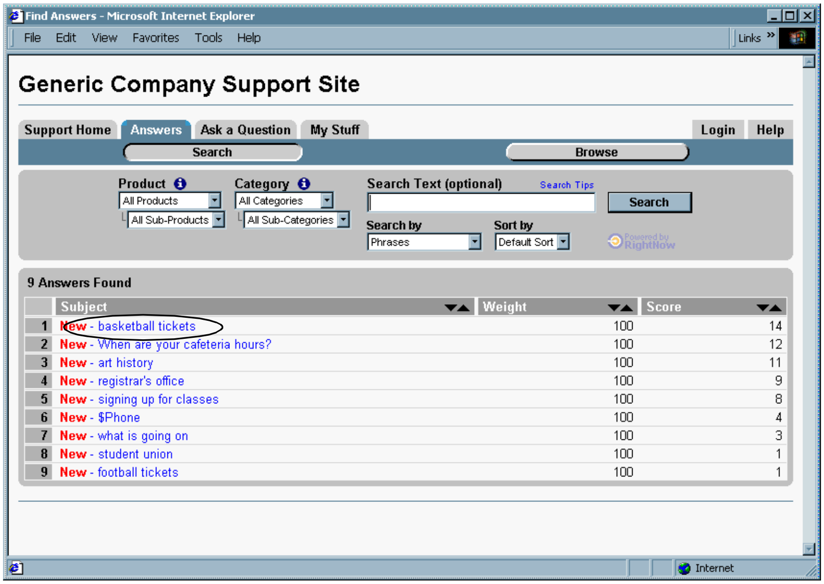


Figure 3-13: Clicking a Subject Link on the Find Answers Page

Path: Support Home>Find Answers>Subject Link

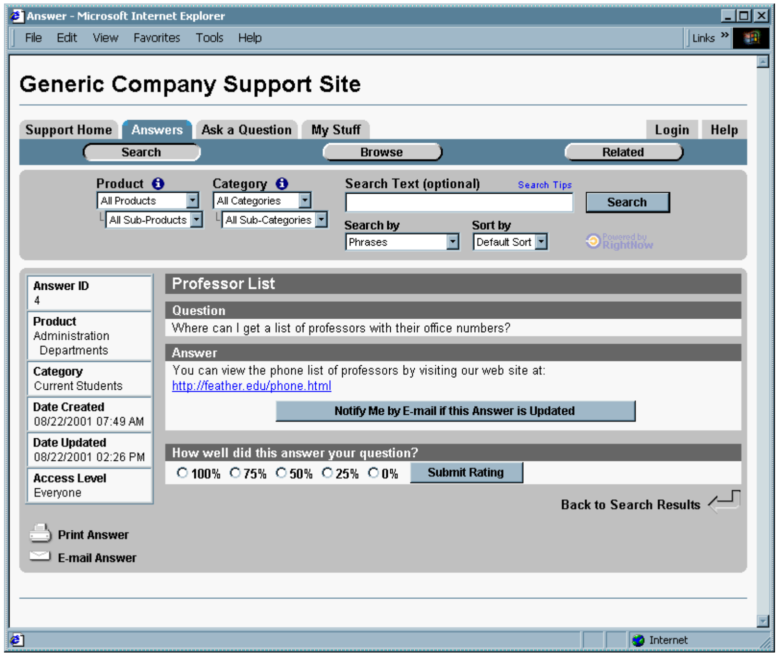


Figure 3-14: Answer Page

The Answer page displays the question and answer as well as answer and custom fields information, including products and categories, date created and updated, and access level. At this point, end-users have several options:

- Subscribe to be notified whenever the answer is updated
- Print the answer
- Email the answer to themselves or someone else
- Rate the usefulness of the answer and provide feedback about the answer
- Search for another answer

Note: Your RightNow administrator can configure the fields that will be displayed on the Answer page through the Search view and also through the visibility settings for custom fields. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

Table 3-2 describes the fields on the Answer Page.

Table 3-2: Answer Page Field Descriptions

Field	Description
Search	This button links to the Answer and Find Answers pages.
Browse	This button links to the Find Answers page where the answers are grouped based on keywords, products, sub-products, categories, sub-categories, and noun phrases in the summary and question fields. Refer to “Browse” on page 3-21.
Related	This button links to the Related Answers page that displays answers related to the last answer the end-user viewed. Refer to “Viewing Related Answers” on page 3-34.
Answer ID	This field displays the answer ID.
Product	This field displays the product(s) of the answer.
Category	This field displays the category(s) of the answer.
Date Created	This field displays the date when the answer was created.
Date Updated	This field displays the date and time the answer was last updated by a staff person.
Access Level	This field displays the access level that has been assigned to the answer by the knowledge base engineer. If a customer is logged in and is associated with a company, they can also view Privileged Access answers from the Answer page.
Question	This field displays the question.
Answer	This field displays the answer.
Notify Me by E-mail if this Answer is Updated	This button subscribes end-users to the answer. Any time this answer is updated, end-users will receive an email. Refer to “Notify Me by Email...” on page 3-29.
How well did this answer your question?	This option allows end-users to rate the effectiveness of the answer. If they rate the answer below 100%, a feedback form opens where they can provide feedback on why the answer did not solve their issue. Refer to “How Well Did This Answer Your Question?” on page 3-32.
Submit Rating	End-users click this button to submit their answer rating.
Print Answer	This button opens a new Web browser that contains a basic text version of the answer that can be printed. See “Print an Answer” on page 3-30.

Table 3-2: Answer Page Field Descriptions (Continued)

Field	Description
Email Answer	This button allows the end-user to send the answer to an email address. A new Web browser opens and the end-user is prompted for their email address, first and last name, subject, comments, and the receiving email address. Refer to “Email an Answer” on page 3-31.
Back to Search Results	This link returns the end-user to the Answer or Search Results page.

The following sections contain descriptions of the options available to end-users when viewing an answer.

Notify Me by Email...

End-users can choose to be notified by email any time an answer is updated. For example, suppose an end-user finds an answer about the release date of a new product. They can subscribe to be notified when the answer is updated (in this example, if and when the release date changes).

Note: End-users must have a valid customer account to subscribe to notification.

If the end-user has not yet logged in during the current session, the Support Login page will open when the end-user clicks 

. Once they successfully log in or create an account, the notification request will be submitted. (For a description of the Support Login page, refer to “End-User Security and Login” on page 3-10.)

Print an Answer

For end-users who want a printout of a particular answer, they can print the basic text version of the answer and designate printer options. When an end-user clicks **Print Answer**, a new Web browser opens and displays a basic text version of the answer. A print window will also open, allowing end-users to easily choose printer options.

Path: Support Home>Find Answers>Subject Link> **Print Answer**

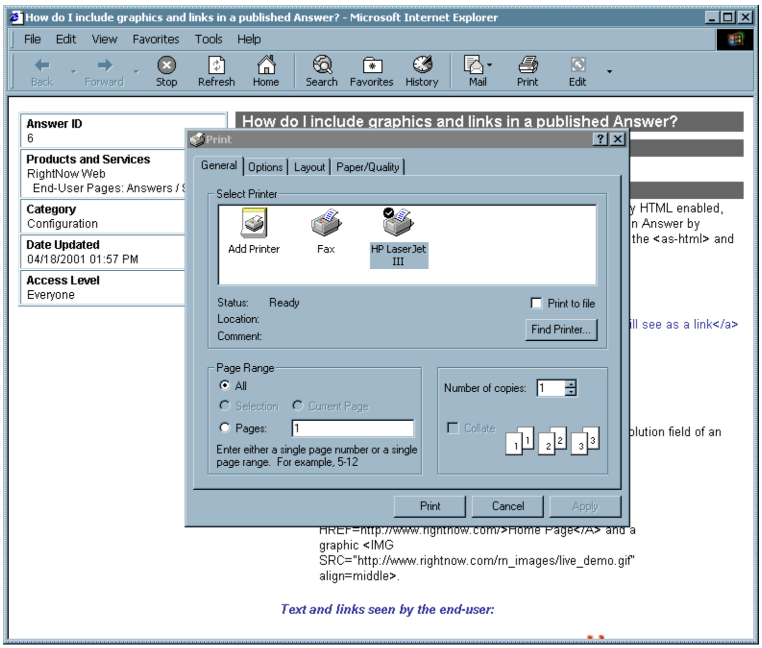


Figure 3-15: Print Answer Page

Email an Answer

End-users can also send an answer to an email address by clicking Email Answer . A new Web browser will open and display a form that prompts them for the email address to send to, the end-user’s first and last name, email address, a subject, and any comments they want to add.

Path: Support Home>Find Answers>Subject Link> Email Answer

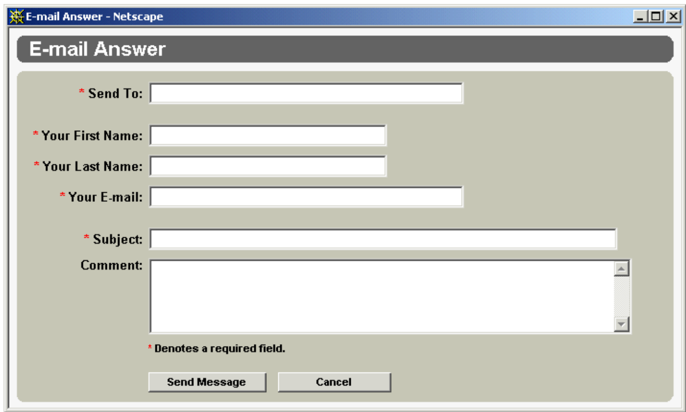


Figure 3-16: Email Answer Form

The asterisk (*) next to a field signifies a required field. If the end-user does not fill in all required fields, a prompt box will indicate which fields need values. Once the end-user completes all necessary information and clicks Send Message, the email will be sent.

How Well Did This Answer Your Question?

To help you improve the quality and content of your public answers, RightNow allows end-users to rate the usefulness of answers in your knowledge base. End-users can make suggestions on how an answer could be improved and can include their email address if they choose. This feedback can then be used to update answers and improve the effectiveness of your knowledge base.

At the bottom of the Answer page, end-users can select a percentage that reflects how well the answer solved their issue. End-users that respond with 100% will return to the Find Answers page; end-users that respond with a rating other than 100% will open a feedback form in a new Web browser.

Path: Find Answers>Subject Link>Submit Rating other than 100%

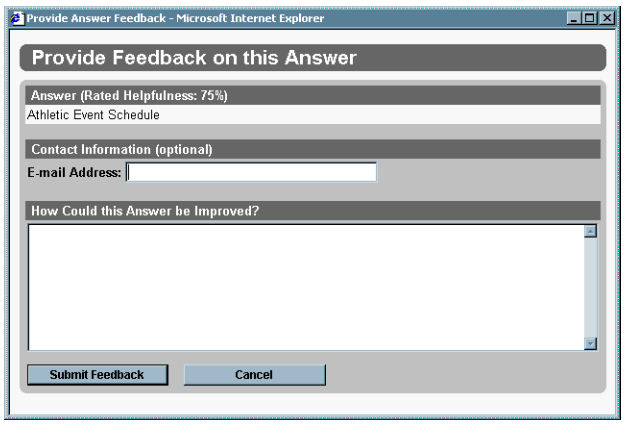


Figure 3-17: Provide Feedback on this Answer Page

When the end-user clicks 

, an incident is created in RightNow. The email address is added as the incident contact and the suggestion is added to the discussion thread (refer to Chapter 4, “Incident Console”).

Note: Your RightNow administrator can specify the URL that will be used for the feedback form and can route the feedback incident using workflow rules. For more information on workflow rules, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

The rating effectiveness feature can be enabled without the feedback form option. In this configuration, the end-user could rate the effectiveness of the answer, but not provide any additional feedback.

When an end-user submits a rating, the solved count of the answer is directly affected. The five percentages, 0, 25, 50, 75, and 100 (percentages are configurable) represent a five-point scale where the solved count of an answer is either raised or lowered. A rating of **0%** decreases an answer’s solved count.

Refer to the following section for a discussion of how the solved count feature works.

Solved Count and Score

The Solved Count feature collects information about the usefulness of answers in your knowledge base and uses this data to rank your answers. Implicit data is compiled by how end-users select and view answers; explicit data is compiled by how end-users rate the effectiveness of individual answers. Using these solved count values, RightNow can dynamically rank the answers by their usefulness and present end-users with the most effective answers first.

Note: By default, the Solved Count feature is enabled.

The answer's score value displayed on the end-user pages is a calculated value equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu on the Add New Answer page or Edit Answer page.

Implicit ratings—Implicit ratings are gathered as end-users view answers. If an end-user views an answer, the solved count increases. If the end-user continues to another answer, the solved count of the first answer is increased, but not as much as the second viewed answer. In other words, the answer that the end-user views last receives the largest solved count increase. Previously viewed answers receive a smaller increase in their solved counts. The solved count is also increased when you or another CSR use a SmartAssistant suggested answer when responding to an end-user's question. For more information on SmartAssistant, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

Note: Your RightNow administrator can configure the rate and frequency by which the solved count of unused answers is reduced.

Explicit ratings—Explicit ratings are gathered from the response to the question, "How well did this answer your question?," which is displayed at the bottom of the Answer page (see Figure 3-14, "Answer Page," on page 3-26). For more information on this feature, refer to "How Well Did This Answer Your Question?" on page 3-32.

Aging

Over time, an unused answer's solved count will gradually decline or age. For example, if an answer has not been viewed for thirty days (the default setting), the solved count will automatically be reduced. The solved count of unused answers also declines at a constant rate over time. Ultimately, if an answer has not been viewed for an extended period of time, an answer's solved count can reach zero.

Viewing Related Answers

While viewing a specific answer, end-users can ask RightNow to search the knowledge base for other answers related to the one they are currently viewing or have previously viewed. Related Answers is a sub-set of the SmartAssistant feature that displays a list of related answers that can further assist end-users in finding solutions and effectively reduces the number of questions submitted to your support staff.

By default the Related Answers feature is enabled. Before the Related button will appear at the top of the Answer page, your site must have enough relatedness information, which is generated through the general use of your site and through an auto-linking feature.

Path: Support Home>Find Answers>Subject Link> Related

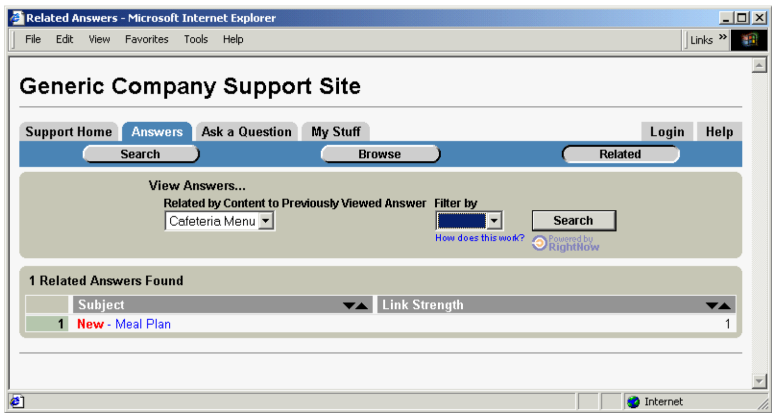


Figure 3-18: Related Answers Page

The View Answers drop-down menu on the Related Answers page contains a list of the answers the end-user has viewed during the current session. The end-user can select an answer and click Search to view additional related answers. If your site has products and categories, the related answers can be filtered by product and category to display only the answers that share a common value for the filter chosen. End-users can click on the subject link to view the details of any of the related answers, just as on the Find Answers page.

Table 3-3 describes the fields on the Related Answers page.

Table 3-3: Related Answers Page Field Descriptions

Field	Descriptions
View Answers...Related by Content to Previously Viewed Answer drop-down menu	This drop-down menu contains all of the answers that have been viewed during the current session. By selecting an answer, the end-user can search for answers related to the selected answer.
	This drop-down menu contains the available filters that can be used to narrow the search for related answers. The default options are no filter, Product, and Category. Only the answers that share a common value for the specified filter will be displayed.
	This button activates the search for answers related to the selected answers using the chosen filter.
How does this work?	This link opens the Help file containing information on the Related Answers page.
Subject	This column displays the question (summary) of the answer.
Subject Link	This blue subject text is a link that opens the Answer page where the end-user can view the complete details of the answer.
Link Strength	This column displays the number of times an end-user has navigated between the answer and the selected answers.

Ask a Question

The Ask a Question component allows end-users to ask questions when they are unable to resolve their issues from viewing the answers in your knowledge base. Remember that your end-users must have a valid account to submit questions to your support staff; in addition, your RightNow administrator can restrict access to the Ask a Question component to only those end-users who have a valid contract with your organization.

When an end-user clicks the **Ask a Question** link or tab, and logs in with a valid user ID, the page that opens depends on how your Right Now administrator has configured eService Center 5.0:

- The **Ask a Question** page opens—End-users fill in the necessary information and submits their question.
- The **Contract Verification** page opens—End-users must verify that they have a current contract with your organization before they can submit a question. When the Contracts module has been enabled, end-users must have a valid contract with your organization in order to submit *any* questions.

Regardless of how your system is configured, all questions are immediately saved in the knowledge base as incidents and can be viewed by you from the Incident Console. Refer to Chapter 4, "Incident Console."

Submitting a Question

Figure 3-19 shows the form where end-users can enter a description of their question and submit it to your support staff.

Path: Support Home>Ask a Question

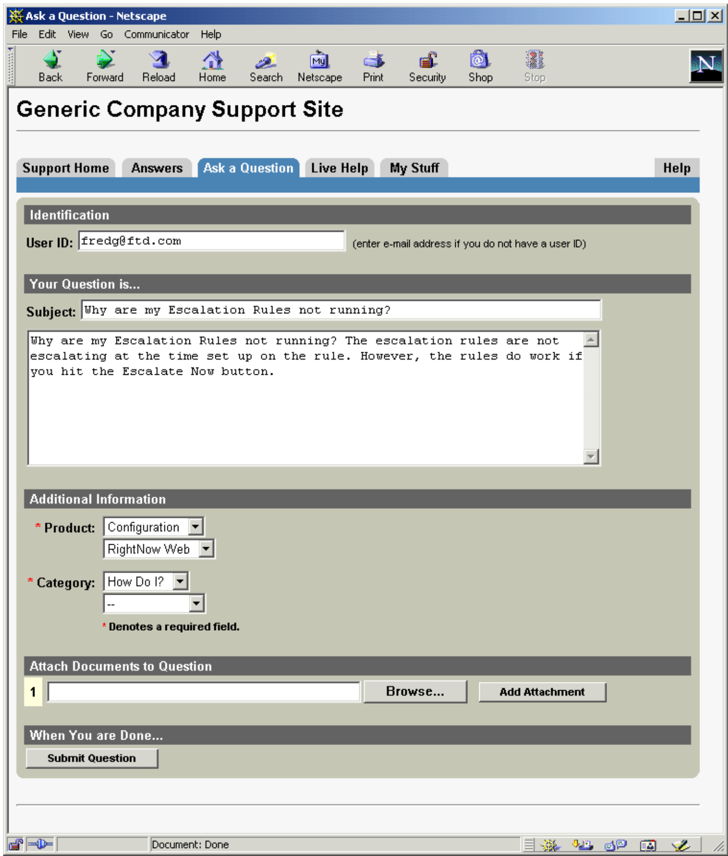


Figure 3-19: Ask a Question Page

Note: Your RightNow administrator can configure the requirements for gaining access to the Ask a Question page by specifying the required fields or by enabling the Contracts module. Your administrator can also configure custom fields to display on the Ask a Question page by specifying the fields to have end-user edit visibility. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

The question form prompts end-users for their user ID, a description of the issue, and the product and category of their issue. End-users can also include file attachments if configured for your site. For end-users who have already logged in during the session, the Ask a Question form will not contain a User ID field.

When end-users click Submit Question, the question is submitted and assigned a reference number. End-users are then notified that their question has been submitted.

Path: Support Home>Ask a Question> Submit Question

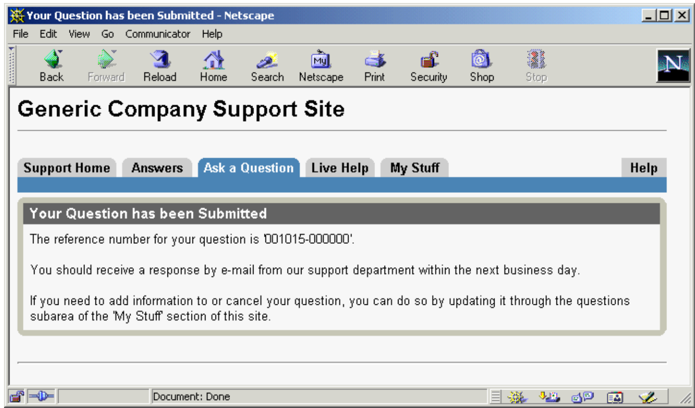


Figure 3-20: Your Question Has Been Submitted Page

Viewing Preliminary Responses

RightNow can also be configured to provide a preliminary response to an end-user's question. Using workflow rules, the administrator can set up RightNow to search the knowledge base for answers to the end-user's question and present a list of possible solutions when the end-user clicks **Submit Question**. This feature can reduce the number of questions submitted to your support staff and offer an immediate response to the end-user.

Path: Support Home>Ask a Question> **Submit Question**

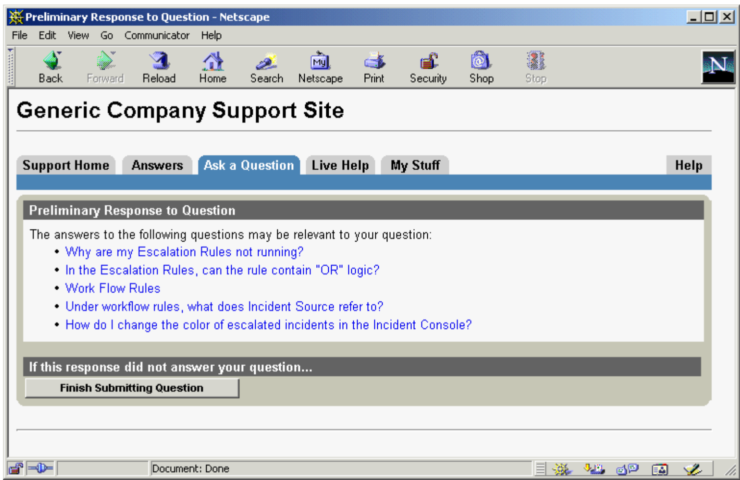


Figure 3-21: Preliminary Response to Question Page

Once RightNow returns a list of possible solutions, the end-user can click a question link to view the question and answer in a new Web browser. If none of the suggested solutions adequately answer the question, the end-user can click **Finish Submitting Question**. The end-user then receives verification that the question has been submitted (see Figure 3-20, "Your Question Has Been Submitted Page," on page 3-38).

Submitting a Question with Contracts Enabled

With the Contracts module enabled, end-users must verify that they have a valid contract before they can submit a question. When end-users click the **Ask a Question** link or tab and successfully log in, the Contract Verification page will open.

Path: Support Home>Ask a Question> Login

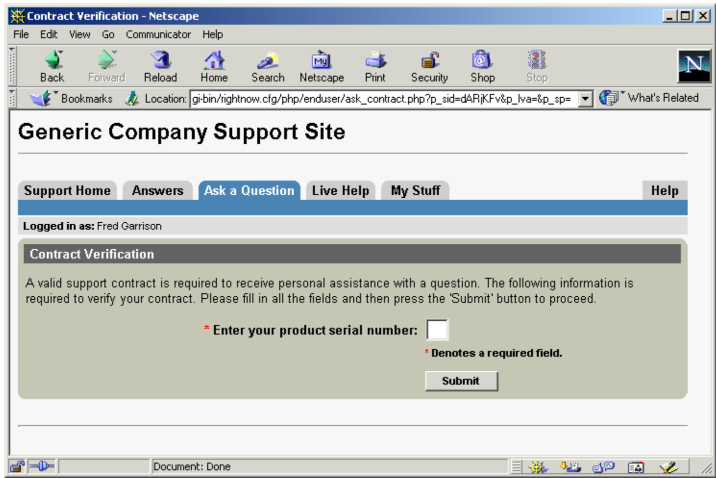


Figure 3-22: Contract Verification Page

The fields contained on this page depend on the configuration of the contract verification fields and the Contracts module in general. When end-users supply the necessary information and click Submit, the Ask a Question page will open. End-users can then enter a description of their question and submit it to your support staff (see Figure 3-19, “Ask a Question Page,” on page 3-37). The remaining number of questions on the contract and the contract expiration date are displayed at the top of the Ask a Question page.

For more information on contracts, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

RightNow Live

RightNow provides two-way, real-time chat and telephone callback for end-users who need immediate assistance. End-users can interact with agents (staff members with Live privileges assigned in their security profiles) in chat sessions to ask questions and get answers. In eService Center 5.0, end-users can search the knowledge base while in the chat queue and receive additional assistance from agents with the new co-browse feature.

Changed

Note: Your RightNow administrator must enable and configure RightNow Live for the Live Assistance link to appear on the Support Home page.

If your site has chat and phone enabled, your Live Assistance page will look similar to Figure 3-23.

Path: Support Home>Live Assistance

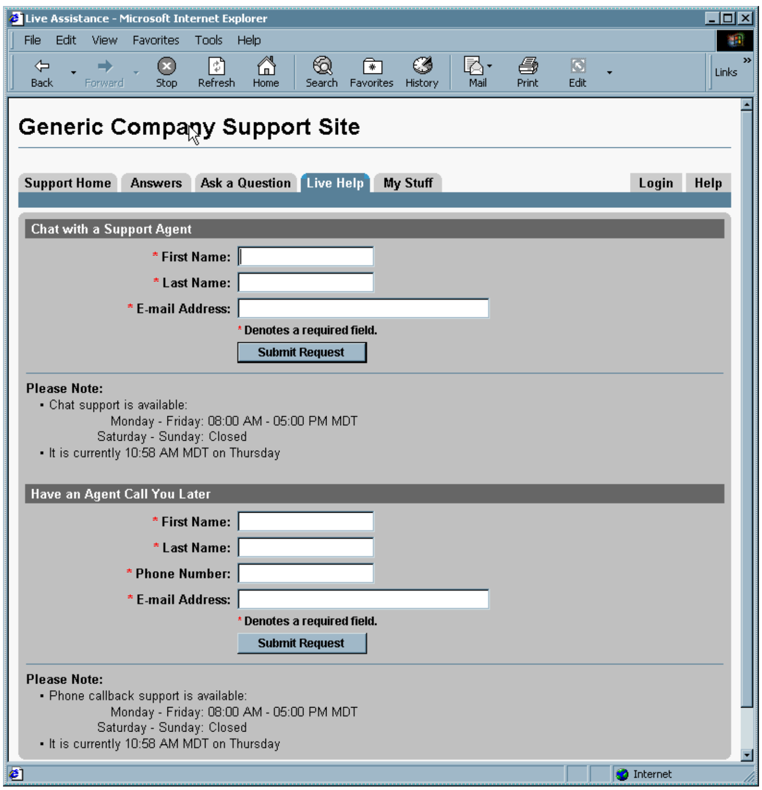


Figure 3-23: Live Assistance Page

Your RightNow administrator can customize this page, including the fields that appear. For information on configuring RightNow Live, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

If your site has only chat support enabled or only phone support enabled, your Live Assistance page will look similar to the following:

Path: Support Home>Live Assistance>Chat Enabled

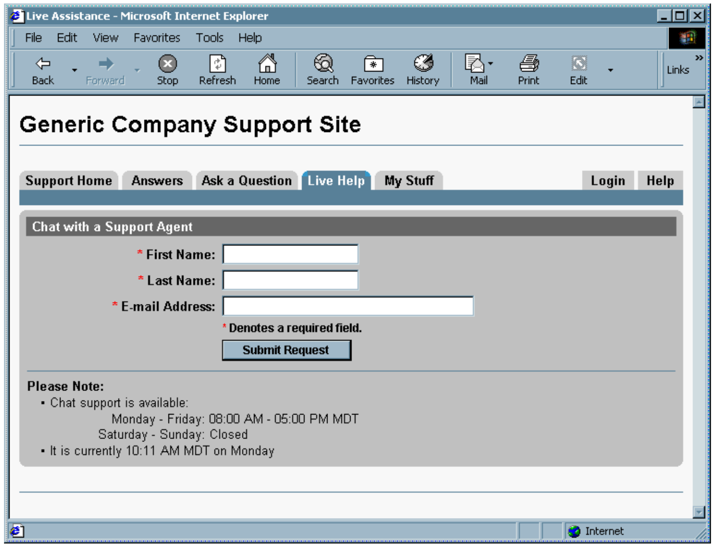


Figure 3-24: Live Assistance Page—Chat Support Only

Path: Support Home>Live Assistance>Callback Enabled

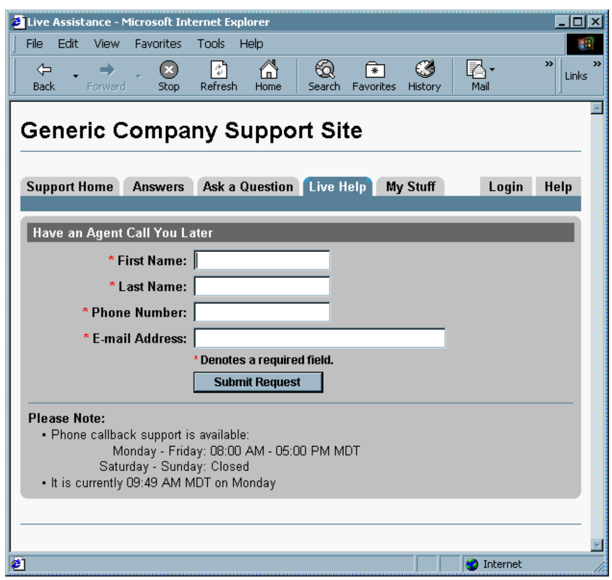


Figure 3-25: Live Assistance Page—Phone Support Only

To submit a chat question, the end-user enters the required information and clicks

to open the chat window.

Path: Support Home>Live Assistance>Submit Request

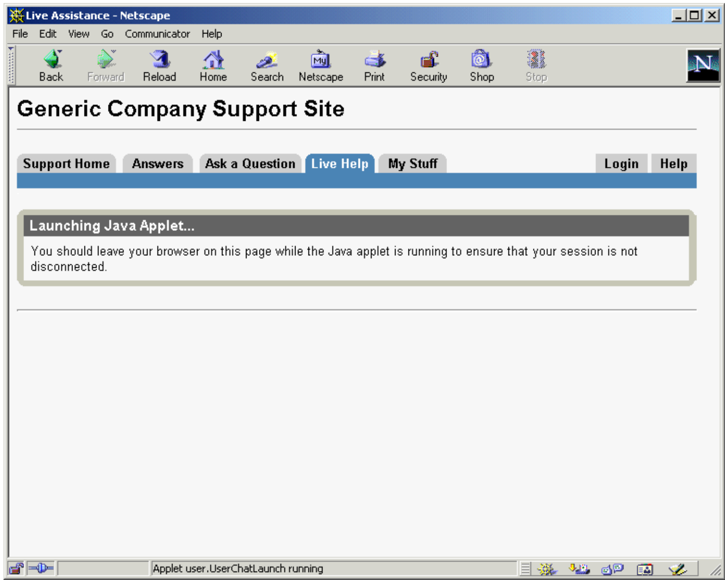


Figure 3-26: Live Assistance Page—Launching Java Applet

If an agent accepts the chat request, the end-user Live Chat window opens.

Path: Support Home>Live Assistance>Submit Request> Accept

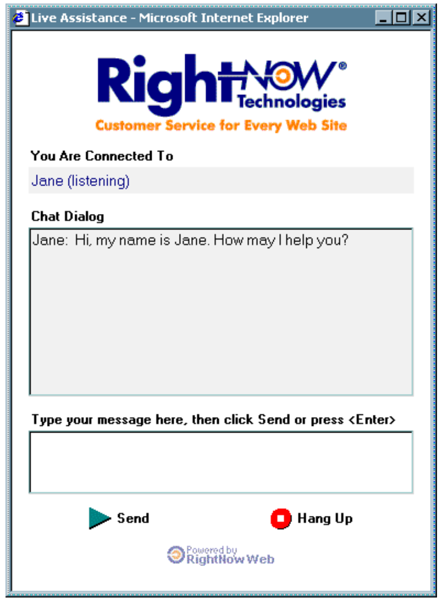


Figure 3-27: End-User Chat Window

All communication between the end-user and the agent is displayed in the Chat Dialog box. The end-user types a question in the message text box and presses **Enter** or clicks Send. The end-user clicks Hang Up to end the chat session. The agent receives a message that the end-user has disconnected.

Wait Queue

When all agents are busy and the wait queue feature has been enabled, end-users will be placed in a wait queue. The wait queue feature notifies end-users of their position in the queue. As agents become available, the end-user's position in the wait queue is updated accordingly. (For information on enabling or disabling this feature, refer to the *RightNow Web eService Center 5.0 Administration Manual.*)

Searching while in the Wait Queue

While waiting for an agent, end-users can search the database for answers. This feature encourages end-users to find their own answers. If the search is successful, end-users are presented with suggested solutions in a separate window. When end-users find the answer they are looking for, they can exit the queue without waiting for an agent.

New

Figure 3-28: Searching in the Wait Queue

RightNow Live Collaboration

New in eService Center 5.0 is RightNow Live collaboration (co-browse), which allows agents to guide end-users through Web pages by taking control of the mouse pointer to demonstrate actions on the end-users's Web page. The end-user's Web page displays a pointer that mimics what the agent does on his or her Web browser. Any text entered by either the end-user or agent is displayed in each Web browser's window. Co-browsing will help eliminate the confusion that can arise when giving instructions to end-users and is also effective for assisting end-users in filling out forms or completing a sale.

New

Refer to "Co-browsing with an End-User" on page 6-26 for procedures on initiating co-browse with an end-user.

Callback Request

End-users who want to speak to a customer service representative or sales person instead of engaging in a Live chat can request a telephone callback on the Live Assistance page (see Figure 3-23, “Live Assistance Page,” on page 3-41). The information the end-user must fill in can be configured by your RightNow administrator.

When an agent accepts the callback request, the end-user will receive the following message:

Figure 3-29: End-User Callback Request Message

Chat Session Unavailable

When Live agents are not available to accept a chat or phone request and the Wait Queue feature has *not* been enabled, the end-user will receive the following message:

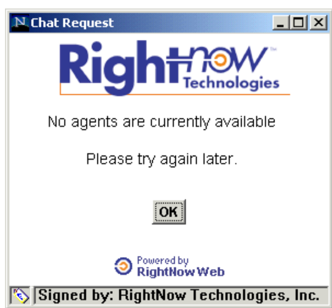


Figure 3-30: No Agents are Available

Note: This window will display to end-users only when there is no entry in the following configuration setting:

RightNow Live>General>Agent>AGENT_UNAVAILABLE_URL

If your administrator has configured your system to route end-users to the Ask a Question page or another Web page when agents are unavailable, end-users will see the following message.

Figure 3-31: Chat Request Window—Request Email Response

When end-users click Request E-mail Response, they are re-routed to the configured RightNow page (Ask a Question or Find Answers) or any other URL.

When end-users make a chat or callback request when agents are not on staff and your site is configured to display a message informing them of your chat hours, the following window opens.

Path: Support Home>Live Assistance

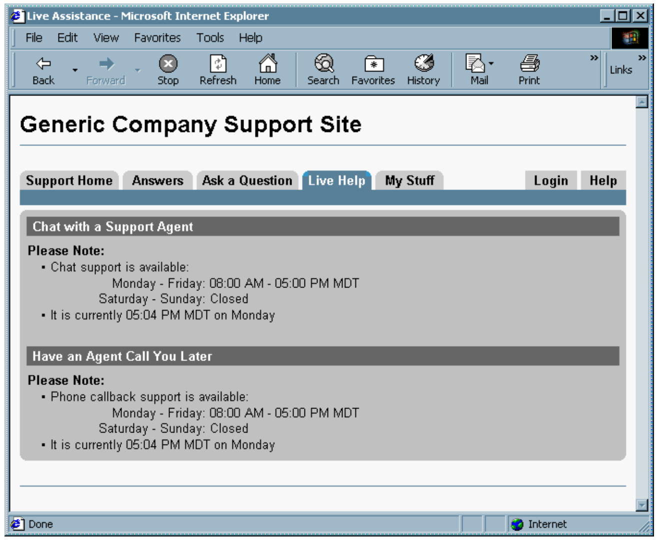


Figure 3-32: Requesting Live Interaction after Business Hours

For detailed information and specific procedures for using RightNow Live, refer to Chapter 6, “RightNow Live.”

My Stuff

The My Stuff component in RightNow allows end-users to access information specific to their customer account. The functions end-users can perform from My Stuff include:

- View the questions they have previously submitted, check question status, and update questions (see “Questions” on page 3-50)
- View the answer notifications they are subscribed to and renew or delete their subscriptions (see “Notifications” on page 3-55)
- Access their profile information and make changes to their search preferences and account and contact information (see “Profile” on page 3-57)

To access My Stuff, end-users must log in with their user ID and password or create a new account. If an end-user has not logged in during a session and clicks the **My Stuff** link or tab, the Support Login page will open. Once the end-user enters a valid user ID and password, or creates a new account, all options in My Stuff will be available, starting at the My Overview page.

Path: Support Home>My Stuff>Login

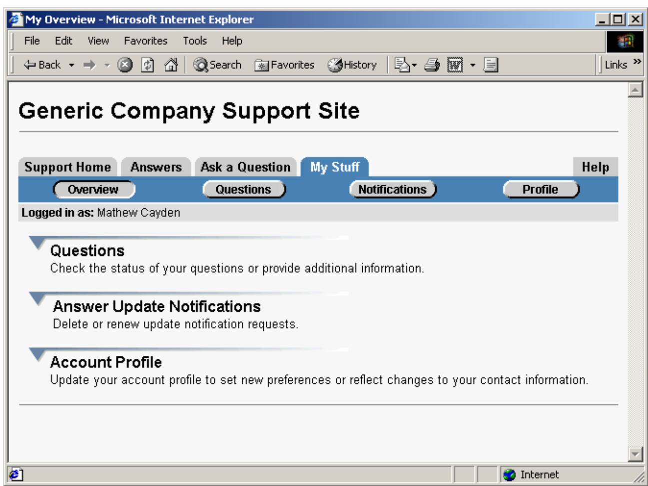


Figure 3-33: My Overview Page

The Overview page is the entrance into My Stuff and displays links to the end-users’ questions, notifications, and profile information. End-users can navigate to these areas by clicking the links in the middle of the page or the buttons directly below the navigation bar.

Questions

When end-users click **Questions**, they are provided with a list of all questions (incidents on the Incident Console) they have previously submitted to your support staff. End-users can track their questions, check the status and view details of their questions, and update their questions with new information. This function allows end-users to manage their questions and can assist you in solving problems. For example, if an end-user submits a vague question that you are unable to answer, the end-user could clarify the issue, saving you time and possibly helping you answer the question more quickly.

Note: Your RightNow administrator can configure the My Questions page to display the end-user's questions or the company's questions by setting the ID Type in the My Stuff—Questions view. For more information on views, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Path: Support Home>My Stuff>Login>Questions

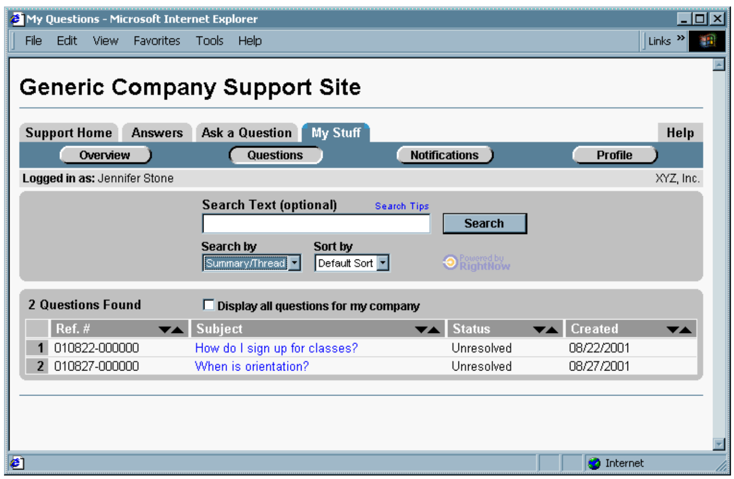


Figure 3-34: My Questions Page

Viewing Questions

As shown in Figure 3-34, end-users can search the list of questions using search text and the Search By drop-down menu. The Search By drop-down menu includes Summary/Thread and Ref. # to reflect these fields on the Incident Console. End-users can also sort the results and view the details of each question by clicking the subject link. Additional fields contained on the My Questions page are described in Table 3-4.

Table 3-4: My Questions Page Field Descriptions

Field	Description
Display all questions from my company	When the end-user selects this check box, all of the questions associated with the end-user's company will be displayed. **Note: RNW User Interface>My Stuff>Questions> MYQ_VIEW_COMPANY_INCIDENTS must be enabled for this check box to appear.**
Reference #	This column displays the reference number of the question in the format yymmdd-xxxxxx, where y=year, m=month, d=day, and x=the number of the incident.
Subject	This column display the summary of the question. On the end-user pages, the incident summary is called the *subject*.
Status	This column displays the status of the incident on the Incident Console. The default statuses are Unresolved, Solved, Updated, and Waiting. Your RightNow administrator can add additional statuses and assign them a default status type.
Unresolved	Indicates that the question has been entered by the end-user requesting assistance, but the incident has not been resolved by your support staff. **Note: If the end-user updates the incident (via My Stuff or by clicking the update link in the email) and it is not marked Solved, the incident status changes to Updated (with an Unresolved status type) on the Incident Console, and the staff member assigned to the incident will be notified that the incident has been updated.**
Solved	Indicates that the question has been solved. **Note: If the end-user solves the incident and marks it Solved, the staff member assigned to the incident will receive a notification.**
Updated	Indicates that the incident has been updated by the end-user. The status type remains Unresolved.
Waiting	Indicates that the question has been responded to by a staff member and is waiting for a response from the incident creator. If no response is received within 48 hours (the time specified in CI_Hours), the system automatically changes the status to Solved and sends the incident creator an email.
Created	This column displays the date that the question was first submitted by the end-user or created by a CSR from the Incident Console.

When the end-user clicks the subject link of a question, the View Question page opens.

Path: Support Home>My Stuff>Login>Questions>Subject Link

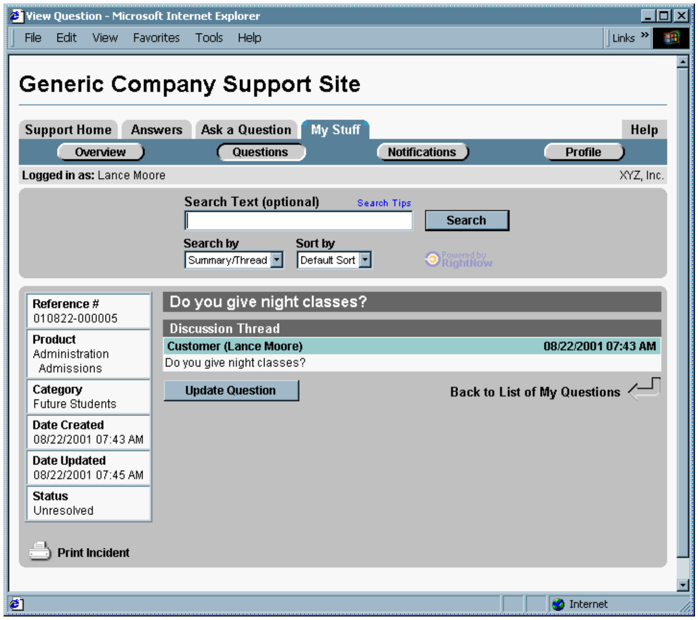


Figure 3-35: View Question Page

In the middle of the page, the complete summary, question, and answer are displayed. On the left-hand side, a table displays specific incident and incident custom field information, including reference number, product, category, date created, date updated, and status. The top of the page contains the same search features as the My Questions page, enabling end-users to quickly search for another question.

Notice that end-users also have the option to print their questions. This option is also available to end-users when viewing answers. Refer to “Print an Answer” on page 3-30.

Updating a Question

When viewing a particular question, end-users may want to provide more information or clarify the question in some way. When end-users click **Update Question** on the View Question page, the Update My Question page will open where they can enter additional information about their question, or indicate they no longer need an answer to the question.

Path: Support Home>My Stuff>Login>Questions>Subject Link> **Update Question**

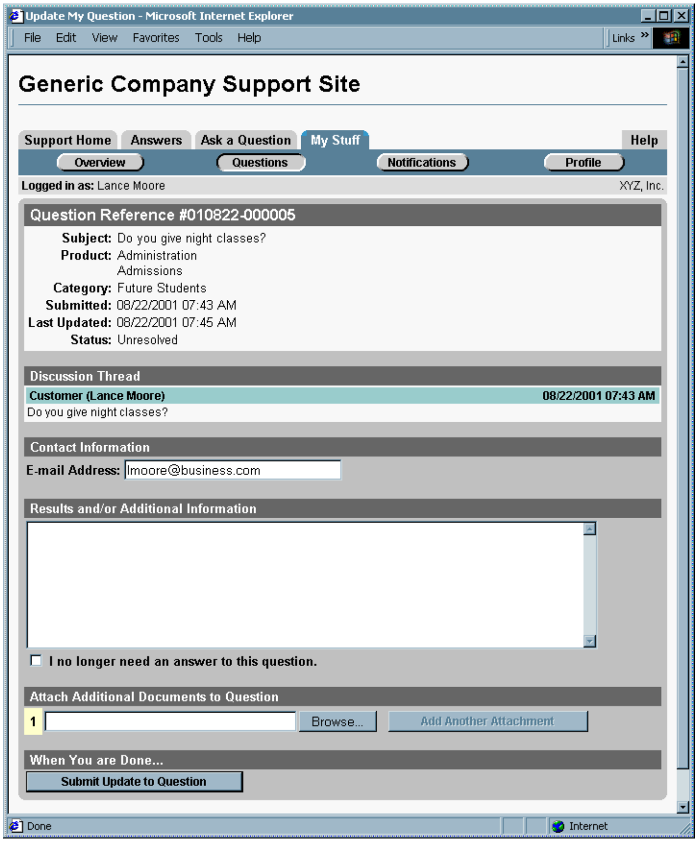


Figure 3-36: Update My Question Page

End-users can update a question in the following ways:

- Add information to the question
- Add a file attachment to the question (if your RightNow administrator has configured this option)

New

When the end-user clicks **Submit Update to Question**, the question update and file attachments are appended to the original question and are visible from the Incident Console. The status of the question (incident) changes to Updated to alert CSRs that the incident has been updated by the end-user. The CSR assigned to the incident will receive an update notification.

Note: The end-user will see the status of the question changed to Updated when returning to the My Questions page.

In addition to updating questions, end-users can also notify your support staff when they no longer need an answer to a question. By selecting the ☐ **I no longer need an answer to this question.** check box and clicking **Submit Update to Question**, the question will be set to the Solved status, and the staff member assigned to the incident will receive an update notification.

Notifications

As noted previously, end-users receive notification by email any time an answer they are subscribed to is updated. The Notifications option in My Stuff displays all of the answers end-users have subscribed to and allows end-users to renew or delete their subscriptions.

Path: Support Home>My Stuff>Login>Notifications

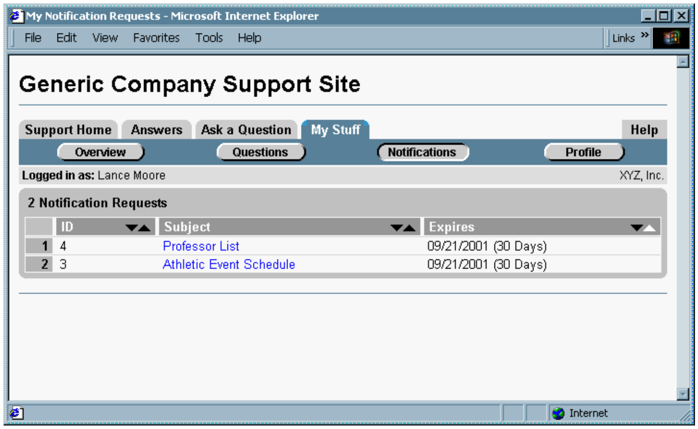


Figure 3-37: My Notification Requests Page

The My Notification Requests page displays the answer ID, subject, and expiration date of all the answers the end-user is subscribed to. (Your RightNow administrator can specify a subscription time period other than the 30-day default.) The end-user can click the subject link of any answer to view the details.

Refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information about answer subscriptions.

Path: Support Home>My Stuff>Login>Notifications>Subject Link

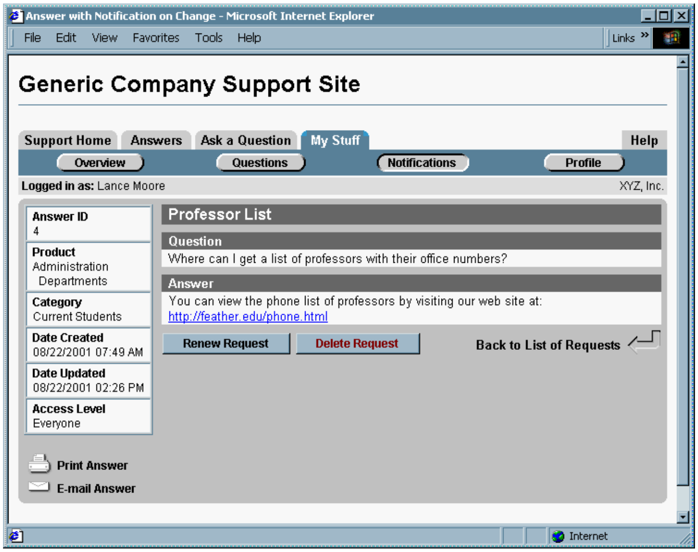


Figure 3-38: Answer with Notification on Change Page

The complete summary, question, and answer are displayed on the Answer with Notification on Change page. On the left-hand side, a table displays answer ID, product, category, date created, date updated, and status (all fields are configurable).

From this page end-users can renew or delete their subscription to the answer, print the answer, or email the answer.

Note: Staff members can choose not to notify end-users when answers are updated. For example, if an answer is changed to correct a spelling or grammatical error, staff members may not want to notify end-users of the change. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Profile

The Profile option in My Stuff enables end-users to view and edit their search preferences and account and contact information. By allowing end-users to update their personal account information, you eliminate a large part of the administrative tasks associated with maintaining customer accounts. Figure 3-39 shows the profile information end-users can update and maintain.

Path: Support Home>My Stuff>Login>Profile

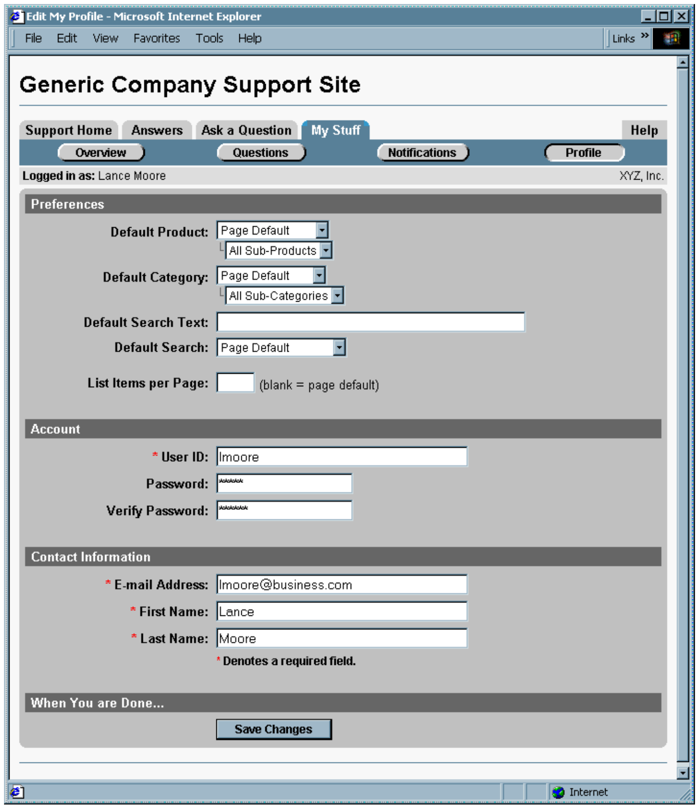


Figure 3-39: Edit My Profile Page

Preferences—End-users can configure certain settings on the Find Answers page. After an end-user logs in, the Find Answers page will default with the settings specified in their profile.

Note: In order for the Find Answers page to reflect an end-user's default settings, the end-user must log in.

Figure 3-40 shows the selection drop-down menus, Search Text box, and Search By drop-down menu from the Find Answers page that can be set in the end-user's profile.

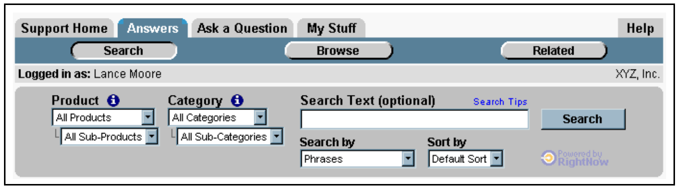


Figure 3-40: Find Answers Page—Selection and Search Criteria

The options set by the end-user are used to execute the initial search from the Find Answers page. The results of the search will be displayed by default when the end-user first accesses the Find Answer page. If the end-user does not specify any preferences, the Find Answers page will display with the default values set by your RightNow administrator.

Account and Contact Information—The account and contact information contains the end-user's user ID and password, email address, and first and last name. End-users can edit this information as needed. When they click Save Changes, the changes will be saved in their customer record.

Note: This form will also contain any customer custom or company custom fields that have end-user edit visibility. For more information about these custom fields, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Table 3-5 describes the fields on the Edit My Profile page.

Table 3-5: Edit My Profile Page Field Descriptions

Field	Description
Preferences	
Default Product	These menus specify the default product and sub-product used on the Find Answers page.
Default Category	These menus specify the default category and sub-category used on the Find Answers page.
Default Search Text	This field specifies the default search text that will populate this search text box.
Default Search	This field specifies the default search criteria when the end-user opens the Find Answers page. For more information on search options, refer to “Search Techniques” on page 3-19.
List Items per Page	This field sets the maximum number of answers that will be displayed on the Find Answers page.
Account	
User ID	This field specifies the end-user’s unique user ID. This value can be any combination of numbers and characters, except spaces and quotation marks.
Password	This field specifies the end-user’s password. This value can be any combination of numbers and characters, except spaces and quotation marks.
Verify Password	This field is used to verify the password specified in the Password field.
Contact Information	
Email Address	This field specifies the email address used to identify the end-user when logging in and for receiving email from RightNow.
First Name	This field specifies the end-user’s first name.
Last Name	This field specifies the end-user’s last name.

Provide Feedback

The Provide Feedback component enables your end-users to submit feedback to your company about your Web site, customer service, or product satisfaction. When end-users click **Provide Feedback** on the Support Home page, a form opens where they can enter a suggestion or complaint and, optionally, their email address.

Path: Support Home>Provide Feedback

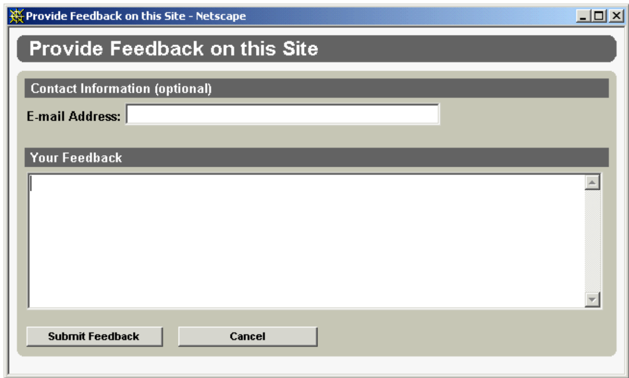


Figure 3-41: Provide Feedback on this Site Page

When the end-user clicks **Submit Feedback**, an incident is created in RightNow with the email address as the incident contact information. The incident Summary is listed as "Site Feedback," and the comments are added to the discussion thread (refer to Chapter 4, "Incident Console").

The site feedback incident can then be routed to the appropriate staff member (using workflow rules) and can be used to update and improve your company's Web site and customer service. For example, suggestions about your Web site could be routed to your webmaster; suggestions and comments about a particular product could be routed to management or the sales department. For more information on how RightNow routes site feedback using workflow rules, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

The end-user receives the following message after submitting feedback:

Path: Support Home>Provide Feedback> Submit Feedback

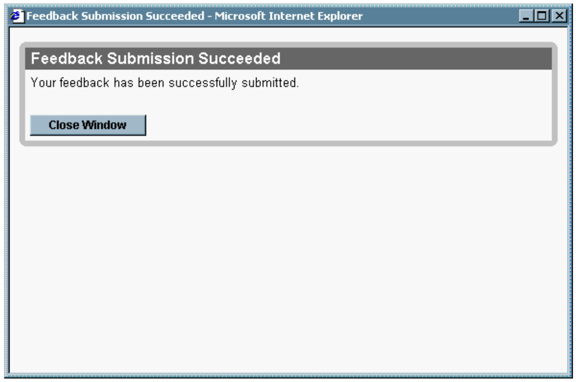


Figure 3-42: Message after Submitting Feedback

Help

The Help tab contains information about the end-user functions in eService Center 5.0 and explains how end-users can navigate RightNow to find the answers they need.

Incident Console

As a customer service representative, you will work primarily from the Incident Console. It is your point of access to all incidents in RightNow where you can track and respond to incidents generated by end-users or customer service representatives. All customer support requests are serviced from the Incident Console, including questions submitted from the Ask a Question page, email inquiries, dialog from Live chat sessions, site and answer feedback, and inquiries from external sources using RightNow's published Application Program Interface.

Enhancements in RightNow Web eService Center 5.0 provide a simplified interface for working with incidents. You will see the following major changes to the Incident Console:

- Incidents submitted by end-users are separated from answers available on the end-user side. Separating incidents and answers will reduce your search time, allowing you to quickly find incidents that need your attention.

New

Note: When upgrading from a previous version of RightNow, all non-private incidents will be converted to answers.

- Process for proposing answers has been streamlined to allow you to quickly propose that an incident become an answer for public viewing.
- Threaded discussion design enables you to view all activity on an incident and track updates and conversations between CSRs and end-users.
- Status Type field added to the default Incident Console view to assist you in effectively managing the incidents in your knowledge base.
- Incident status automatically changes to Updated when end-users update the questions they have submitted.
- Forward and BCC features enable you to forward incidents to email addresses other than staff members and blind copy (BCC) staff members.
- Reference number field added to the Incident Console enables you to quickly access a specific incident.
- Hierarchal response folders provide easy access to standard responses when responding to incidents.

Additional changes are noted throughout this chapter. For information about answers and the new Answer Console, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

This chapter is divided into the main actions you take on incidents and the primary pages you access to perform those actions:

- Search for incidents from the Incident Console (“Searching for Specific Incidents” on page 4-9)
- View incident details from the Incident Details page (“Viewing Incident Details” on page 4-12)
- Edit incidents from the Editing Incident page (“Editing Incidents” on page 4-18)
- Add incidents from the Add New Incident page (“Adding Incidents to the Knowledge Base” on page 4-49)

Within each main section are procedures for the associated actions you can perform from the primary page.

Key Terms

As you work with incidents, you will want to become familiar with the key terms associated with the Incident Console and associated pages:

Clipboard—A function for responding to, forwarding, or deleting several incidents with one action.

Discussion thread—The list of all activity on an incident, including updates made by the end-user, responses entered and/or sent by CSRs, conversations between the end-user and staff, and notes about the incident made by CSRs (never visible to end-users). Discussion thread provides a permanent history of the incidents in your knowledge base.

File attachments—A file that is permanently attached to an incident or sent with incident responses. Attachments can also be added when editing or responding to an incident, but not saved as part of the permanent incident record.

Incident—Any question or request for help from an end-user through Ask a Question or email inquiries, Live chat sessions, site or answer feedback, or inquiries from external sources using RightNow's published Application Program Interface; a question that has been entered into the Incident Console and, once solved, can be proposed as an answer.

Incident locking—An automatic lock placed on an incident whenever someone is updating, editing, or responding to the incident. If another person (end-user or staff member) attempts to update, edit, or respond to that incident at the same time, a warning will be displayed**.**

Propose answer—A function for proposing that an incident become a publicly viewable answer. A copy of the incident is created as an answer and can be viewed and edited from the Answer Console. The knowledge base engineer then determines its access level, status, language, and visibility.

SmartSense rating—An administration feature that estimates an end-user's emotional state or attitude based on the words and language they use when submitting an inquiry; SmartSense also estimates the end-user's and agent's emotional state or attitude when engaged in a Live chat.

SmartAssistant suggested answers— A feature for searching the knowledge base for applicable answers to include in an incident response.

Time billed—A function for tracking the time you spend working on incidents.

We begin this chapter with an introduction to the Incident Console.

Navigating the Incident Console

Changed

The Incident Console provides one location for setting the criteria for searching the knowledge base, viewing the list of incidents returned from your search, working with specific incidents, adding incidents to the knowledge base, and managing Incident Console views.

To access the Incident Console:

From any administration page, click on the icon toolbar. (For instructions on logging in, refer to Chapter 2, “Getting Started.”)

Path:

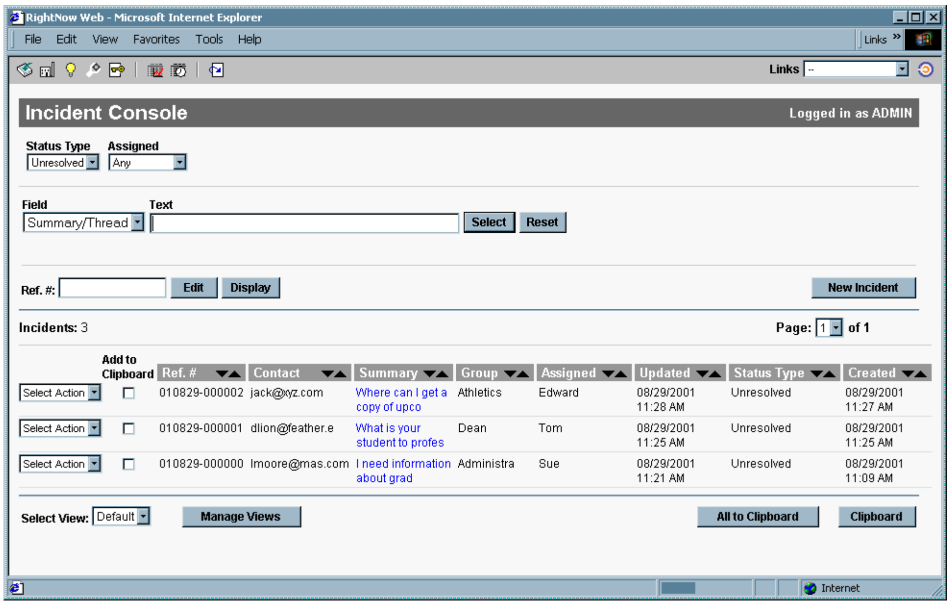


Figure 4-1: Incident Console—Default View

Changed

The Incident Console is divided by a horizontal line. Above the line are the tools for searching for specific incidents and adding new incidents; below the line are the incidents returned from the search. Figure 4-1 shows the new Incident Console default view.

The default Incident Console view displays a list of all unresolved incidents sorted by the Created field. The most recent incident is displayed first. Reading left to right, incident details include the reference number, contact name, a summary of the incident, the group assigned to the incident, the staff member assigned to the incident, the date of the last update, the incident status type, and the date the incident was created.

In eService Center 5.0, incidents have both a status type and a status, providing an accurate and complete representation of the current state of each incident in your knowledge base. The next section describes incident status type and status.

Understanding Incident Status Type and Status

As you work with incidents, it is important that you understand the difference between incident status type and status so that you can effectively manage the incidents in your knowledge base. Incidents have one of three default status types: Unresolved, Solved, or Waiting. Each incident also has a status that corresponds to the status type. The default incident statuses are Unresolved, Solved, Updated, or Waiting.

The status type and status change automatically to reflect the action(s) you or your end-users take on the incident. You can also manually change an incident's status, which may change its status type.

Review the following scenario to see how actions by you and the end-user will automatically change an incident's status type and status.

1. An end-user submits a question from the Ask a Question page. The new incident has a status type and status of Unresolved.
2. The end-user then updates the question to clarify it or to add additional information. The incident remains unresolved with an Unresolved status type, but the incident status changes to Updated to reflect the end-user's actions and to alert you to the end-user's update.
3. You or another CSR edit the incident and respond to the end-user with an answer or possible resolution to the question. The status type and status automatically change to Waiting when you select the Send Response check box. The Waiting status signifies that you have sent a response and are "waiting" for the end-user to let you know if this answers the question.
4. The end-user sets the incident to Solved through My Stuff or via the link in the email response. The status type and status automatically change to Solved.

   Note: If the end-user does not respond within forty-eight hours (the default time specified in CI_Hours), the system automatically changes the status to Solved and sends an email to the incident creator.

This example shows the actions that trigger changes to an incident's status and status type. Your RightNow administrator can also define additional statuses and assign them a default status type. The functionality of the new status will correspond to the status type assigned to it.

Table 4-1 describes the fields and buttons on the Incident Console and the actions necessary to set the criteria to search for specific incidents.

Table 4-1: Incident Console Field Descriptions

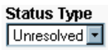
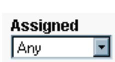
Field/Button	Description
Search criteria	
	Click this drop-down menu to select an incident status type. You can also select Any from this drop-down menu to search all incidents in the knowledge base. The default incident status types are Unresolved, Solved, and Waiting. (Your RightNow administrator can add additional incident statuses and then assign them a default status type. Refer to Table 4-2, “Incident Details Page Field Descriptions,” on page 4-15 for definitions of the default incident statuses.)
Unresolved	Indicates that the incident has been entered by an end-user requesting assistance or updated by an end-user. This is the default option. **Note: When an end-user updates an incident (via My Stuff or by clicking the update link in the email) that has not been solved, the incident status changes to Updated (with an Unresolved status type), and the staff member assigned to the incident is notified that the incident has been updated. When you send a response to the end-user, the incident status and status type automatically change to Waiting.**
Solved	Select this option to search incidents with a Solved status type. This option indicates that the incident has been solved. **Note: When an end-user solves an incident and marks it Solved, the staff member assigned to the incident will be notified that the incident has been solved.**
Waiting	Select this option to search incidents with a Waiting status type. This option indicates that the incident has been responded to by a staff member and is waiting for a response from the incident creator. (The incident status also changes to Waiting.) If no response is received within forty-eight hours (the default time specified in CI_Hours), the system automatically changes the status to Solved and sends an email to the incident creator.
	Click this drop-down menu to select one of three default assigned options: Any, Admin, or Unspecified.
Any	This option indicates the incident was created by a staff member or by an end-user from a question submitted from the Ask a Question page or via email.
Admin	This option indicates the incident was created by a staff member.
Unspecified	This option indicates the incident was created by an end-user from a question submitted from the Ask a Question page or through email.

Table 4-1: Incident Console Field Descriptions (Continued)

Field/Button	Description
Field Summary/Thread	This drop-down menu specifies the fields used in the search. The defaults are Summary/Thread, Ref. #, and Contact. **Note: You can change the options in the drop-down menu by editing your Incident Console view. For more information, refer to Chapter 7, "Incident and Customer Consoles Views."**
Summary/Thread	This option searches the question in the Summary field and the Discussion Thread section of the incident. Refer to "Viewing Incident Details" on page 4-12 and "Editing Incidents" on page 4-18 for more information about discussion thread.
Ref. #	This option searches the reference number incident field.
Contact	This option searches the Contact Email field.
Text search box	Type one or more keywords or phrases to search the database for related incidents.
Select	Click this button after you have selected your criteria and entered your keywords to view related incidents.
Reset	Click this button to reset to the defaults.
Ref. #	Type a reference number in this field to search for a specific incident.
Edit	After entering a reference number, click this button to open the Editing Incident page for the specific incident.
Display	After entering a reference number, click this button to open the Incident Details page for the specific incident.
New Incident	Click this button to create a new incident.
List of Unresolved Incidents	
Select Action	Click this drop-down menu next to the appropriate incident to select the action you want to perform, including Edit, Display, Forward, Print Incident, Propose, Delete, Transactions, Time Billed, Display Customer, and Customer History.
Add to Clipboard	Select this check box to add an incident to the Clipboard for performing a single action on multiple incidents. For more information, refer to "Adding Incidents to the Clipboard" on page 4-56.
Ref #	This is the reference number of the incident.
Contact	This is the email address of the person who submitted the incident.
Summary	This field displays a one-line summary of the incident.

Table 4-1: Incident Console Field Descriptions (Continued)

Field/Button	Description
Group	This field displays the group to which the incident is assigned. Groups, such as Staff, are defined by your RightNow administrator.
Assigned	This is the staff member assigned to the incident.
Updated	This field displays the date and time the incident was last updated, either by a CSR or the end-user.
Status Type	This field displays the incident status type.
Created	This field displays the date and time the incident was created. In the default Incident Console view, incidents are sorted by this field with the most recent incident appearing first in the list.
Select View: Default	Click this drop-down menu to select a view for the Incident Console. You can also choose a default view that will be displayed when you log in. See Chapter 7, “Incident and Customer Consoles Views,” for additional information.
Manage Views	Click this button to create or edit a view. For more information on the Manage Views function, refer to Chapter 7, “Incident and Customer Consoles Views.”
All to Clipboard	Click this button to add all incidents to the Clipboard. The Clipboard feature allows you to perform certain actions on a number of incidents at once rather than performing the same action on each incident individually. For more information on this feature, refer to “Adding Incidents to the Clipboard” on page 4-56.
Clipboard	Click this button to open the Update Clipboard Incidents page. For more information, refer to “Adding Incidents to the Clipboard” on page 4-56.

Searching for Specific Incidents

One of your most frequent tasks will be searching for and viewing particular sets of incidents. The drop-down menus and Text search box on the Incident Console allow you to selectively view sets of incidents that are most relevant to your work.

You can quickly search for incidents using various criteria, from a broad perspective using only a few criteria to a more narrow perspective using several criteria. For example, you may want to view all incidents with a Waiting status type, or view all unresolved incidents assigned to staff member Tom.

As you become familiar with the Incident Console, you will identify the drop-down menus and options in the Field drop-down menu that you use most often when selecting incidents. You can then customize your Incident Console view to display those drop-down menus and search criteria options as well as define which fields to show in the list of incidents. To work effectively, we recommend designing a custom view specifically for the work you do. For procedures on creating a customized view, refer to Chapter 7, “Incident and Customer Consoles Views.”

Note: Staff members with limited access profiles may have only one permanent view, and the Manage Views function may not be available.

A new option for searching for incidents in this version of RightNow is Summary / Thread. When you use this search criteria option (the default on the Field drop-down menu), RightNow searches the Discussion Thread section of incidents, including the Summary field and all previous entries in each incident’s discussion thread, for the keywords you enter in the Text field. This will include any response or notes you or other CSRs added regarding the incident or any conversations with the individual who submitted the question. For additional information about discussion thread, see “Viewing Incident Details” on page 4-12.

New

By default, RightNow searches the incidents in the knowledge base using the Complex Expression search technique. This technique does not require the large computational factors that other techniques require. And Complex Expression is the only technique that supports wildcard searching, which enables you to search for phrases and words when you know only a portion of them. Word stemming and logical operators are also supported in this search technique. Refer to “Search Techniques” on page 3-19 for more information about Complex Expression.

Changed

This section shows you how to search the knowledge base for specific incidents based on selected criteria.

To search for incidents based on selected criteria:

1. Select the appropriate values from the selection criteria drop-down menus at the top of the page, including Status Type and Assigned. For definitions of these menus, refer to Table 4-1, “Incident Console Field Descriptions,” on page 4-6.

New

Note: A new feature in eService Center 5.0 allows your RightNow administrator to set the period of time for how long incidents need to be solved before they become dormant (default is 30 days). Once dormant, the incidents can be excluded from any Incident Console search that specifies, in part, Status = Solved (for example, if you change the Status Type field to Any, RightNow will search all incidents in the knowledge base). Excluding dormant incidents from your search will reduce database loads for hosted customers.

Path:

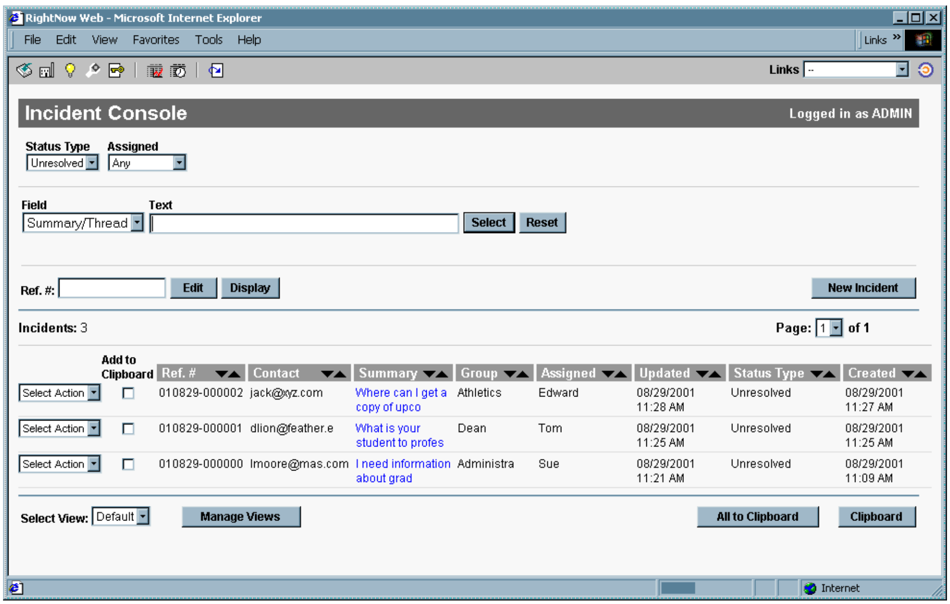


Figure 4-2: Incident Console

2. Click **Field** [Summary/Thread] to select a field to use for your search. For definitions of the default fields, refer to Table 4-1, “Incident Console Field Descriptions,” on page 4-6.

New

3. Type the text for your search in the Text field and click [Select] to view the related incidents. This queries the database and displays the incidents that match your criteria.

   Note: You can also type the incident reference number and click [Edit] or [Display] to open the Editing Incident or Incident Details page for a particular incident.

4. To re-sort the incidents returned from your search in either ascending or descending order, click the box at the top of any column. (You can also change the default sort through the Manage Views function.)

5. To edit an incident and/or respond to an end-user, refer to "Editing Incidents" on page 4-18.

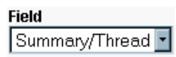
6. To view the details of a specific incident, refer to "Viewing Incident Details" on page 4-12.

Searching by Multiple Criteria

In eService Center 5.0, you can search the Incident Console using multiple criteria. For example, suppose you want to see all incidents created in a particular month that deal with troubleshooting issues. Using multiple criteria, RightNow will return all incidents that meet this criteria.

New

To search using multiple criteria:

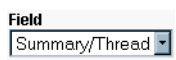
1. Select the first search criteria by clicking 

. (In this example, leave at the Summary/Thread default.)

2. Type the text to search for in the Text search box (in this case, type `troubleshooting`).

   This will search each incident's Summary field and discussion thread for any variation of "troubleshooting."

   Note: Make sure you select the search field first and then enter the criteria in the Text search box; otherwise, criteria will be set incorrectly, and search results will be unsatisfactory.

3. Select the second search criteria by clicking 

and selecting Ref. #.

4. Type the text to search for in the Text search box (in this case, type `0108*`) and click 

.

   This will search the Ref. # field for all incidents beginning with "0108." RightNow will return all incidents created in August dealing with troubleshooting issues.

   Note: When you specify criteria for a field, an asterisk will be displayed next to the field name when you use the drop-down menu again. In this way, when you specify criteria for a certain field, you can check the other fields that have criteria set.

5. To reset the search criteria to the defaults, click 

.

Viewing Incident Details

Once your search returns the desired results, you can view the details of each incident. Viewing an incident's details allows you to take a closer look at an incident to gather more information about the end-user's issue. Once you understand the nature of the issue, you can take the appropriate action.

As you become familiar with the Incident Console, you will see there is more than one way to access a particular function. For example, note the buttons at the top of the Incident Details page; you can also access these options from the Select Action drop-down menu on the Incident Console.

To view incident details:

1. Click the summary link of an incident to open the Incident Details page.

   Or

   Click Select Action next to the appropriate incident and select Display.

***Path:* >Summary Link**

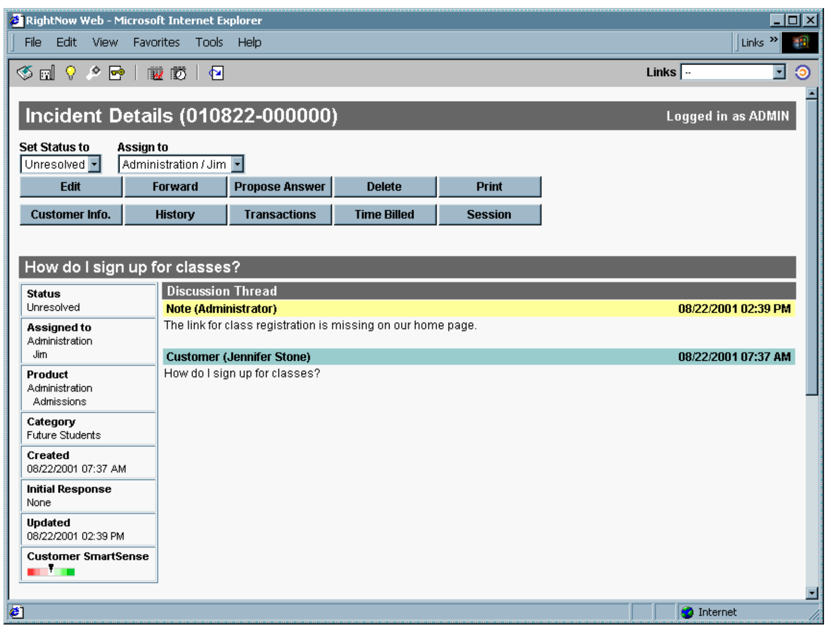


Figure 4-3: Incident Details Page—Top

Changed

The new layout of the Incident Details page groups related information and makes navigating to associated functions and pages easier. The new layout also enables you to quickly scan an incident for the information you need.

In addition to viewing an incident's details, this page also provides one location for performing a variety of actions, including:

- Setting the status of the incident and assigning the incident to a staff member
- Editing the incident to update the incident or update and send a response to the incident creator (refer to "Editing Incidents" on page 4-18)
- Forwarding the incident to an outside email address
- Proposing an answer from this incident (refer to "Proposing Answers" on page 4-54)
- Deleting the incident from the database
- Printing the incident details
- Viewing additional information about the incident and the end-user who submitted the question, including the customer information, incident history, transaction information, and customer session (refer to "Using Additional Tools to Solve Incidents" on page 4-42)
- Adding, deleting, or editing time billed (refer to "Tracking Time Spent on Incidents" on page 4-37)

Figure 4-3 shows the top of the Incident Details page. You can change the incident status and the staff member assigned to the incident and perform specific actions on the incident by clicking the appropriate button.

Below the buttons are the details for the particular incident. On the left-hand side is a table of incident fields listing important details such as product, sub-product, category, sub-category, assigned to, when the incident was created, whether a response was sent, the last time the incident was updated, and the rating on the SmartSense emotive meter (see "SmartSense Emotive Rating" on page 4-17 for a description of this feature).

Across from the incident details is the Discussion Thread section. New in eService Center 5.0, the Discussion Thread section lists all activity on the incident in chronological order, including:

New

- Summary (subject) of the incident
- Updates made by the end-user
- Responses entered and / or sent by CSRs
- Conversations between the end-user and staff
- Notes about the incident made by CSRs (never visible to end-users)

The straightforward format of the discussion thread enables you to quickly see all entries made to an incident.

Note: When converting incidents from a previous version of RightNow, the incident description and solution are threaded.

Scroll down the page to display the remaining sections on the Incident Details page.

***Path:* >Summary Link**

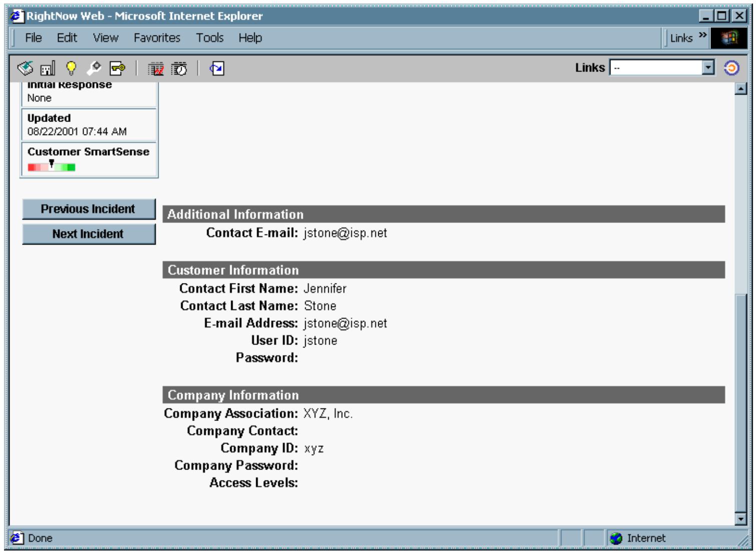


Figure 4-4: Incident Details Page—Bottom

Additional details about the incident are divided into three sections:

Additional Information—This section contains the email address of the end-user who submitted the question (Contact Email) and information from any incident custom fields that have been created by your RightNow administrator.

Customer Information—Details from the customer record (refer to Chapter 8, “Customer Console”) are displayed in this section, including first and last name, email address, user ID, password, and any customer custom fields created by your RightNow administrator.

Company Information—If the end-user has a company association, the company details will be listed here, including company name, company contact, company ID and password, access levels of answers in Privileged Access, and any company custom fields created by your RightNow administrator. Refer to “Associating Customers with Companies” on page 8-12 for information about company association and privileged access.

Note: The fields displayed depend on your RightNow configuration.

To perform specific actions from the Incident Details page:

1. To change the incident status or to assign the incident to a staff member, select the desired values from the Set Status To or Assign To drop-down menus (refer to Table 4-2).
2. To take further action on the incident, click the appropriate button at the top of the page. Refer to Table 4-2 for button descriptions and the appropriate section in this chapter for specific instructions.
3. To view the next incident, click **Next Incident**; to view the previous incident, click **Previous Incident**.

Table 4-2: Incident Details Page Field Descriptions

Field/Button	Description
Set Status to Unresolved	Click this drop-down menu to change the status of the incident. The default statuses are Unresolved, Solved, Updated, and Waiting.
Solved	Indicates that the incident has been solved. **Note: If the end-user solves the incident and marks it Solved, the staff member assigned to the incident will be notified that the incident has been solved.**
Unresolved	Indicates that the incident has been entered by an end-user requesting assistance or updated by a staff member, but no response has been sent. (When you send a response, the status is automatically changed to Waiting.)
Updated	Indicates that the incident has been updated by the end-user. **Note: If the end-user updates an incident (via My Stuff or by clicking the update link in the email) that has not been solved, the incident status changes to Updated (with an Unresolved status type), and the staff member assigned to the incident will be notified that the incident has been updated.**
Waiting	Indicates that the incident has been responded to by a staff member and is waiting for a response from the incident creator. The incident status type also changes to Waiting. **Note: If no response is received within forty-eight hours (the default time specified in CI_Hours), the system automatically changes the status to Solved and sends an email to the incident creator.**
Assign to Unspecified	Click this drop-down menu to assign the incident to a group or staff member. Once you make a selection, the incident is automatically assigned to that staff member or group (no need to click a button).
Edit	Click this button to open the Editing Incident page. You can edit the incident and save the changes without sending a response or send a response to the end-user. Refer to “Editing Incidents” on page 4-18.
Forward	Click this button to forward the incident to any email address.

Table 4-2: Incident Details Page Field Descriptions (Continued)

Field/Button	Description
Propose Answer	Click this button to propose that this incident be converted to an answer that can be designated for viewing by your end-users. Refer to “Proposing Answers” on page 4-54.
Delete	Click this button to delete the incident. You will receive a message confirming your action before the incident is permanently deleted.
Print	Click this button to print the details of the incident.
Customer Info.	Click this button to display the record of the end-user who submitted the incident. For more information, refer to “Viewing Customer Information” on page 4-42.
History	Click this button to display the history for the end-user who submitted the incident. This includes all incidents the end-user has previously submitted and, if the end-user is associated with a company, all questions from other end-users associated with the company. See “Viewing an End-User’s Incident History” on page 4-48.
Transactions	Click this button to display all activity on the selected incident. Transaction information includes date and time, type (the action performed on the incident), the person who performed the action, and a description of the transaction. See “Viewing Incident Transactions” on page 4-45.
Time Billed	Click this button to track how much time you and other CSRs spend on a particular incident. See “Tracking Time Spent on Incidents” on page 4-37.
Session	Click this button to display all the activities the end-user performed from your support site before submitting a question. Customer session information includes date and time, activity type, and a description of the activity. See “Viewing a Customer Session” on page 4-43.
Previous Incident	Click this button to view the details of the previous incident. The order of incidents is determined by the order on the Incident Console.
Next Incident	Click this button to view the details of the next incident. The order of incidents is determined by the order on the Incident Console.

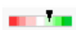
The next section contains a description of RightNow’s SmartSense emotive rating and how SmartSense can help you improve service to your end-users.

SmartSense Emotive Rating

RightNow's SmartSense can help you estimate the emotional state or attitude of end-users when they submit questions or when engaged in a Live chat. You can use SmartSense to determine which end-users need immediate attention and when to escalate incidents to supervisors or other staff members. The emotive rating can also be used to create workflow and escalation rules. (Refer to the *RightNow Web eService Center 5.0 Administration Manual* for information about rules.) You can also customize your Incident Console view to display the SmartSense Customer field on the Incident Console. Refer to Chapter 7, "Incident and Customer Consoles Views," for details.

SmartSense scans each incident and rates the words and phrases in the question (incident Summary field) and any updates made by you and the end-user (found in the discussion thread). These values are totaled to provide an overall emotive rating (positive, neutral, or negative) for the incident. (SmartSense also recognizes some emoticons and acronyms, and the SmartSense rating may be enhanced if emotive words are set in all capital letters or the sentence contains an exclamation point.)

Note: Only response threads are calculated for the SmartSense rating; note threads are not calculated.

In this version of RightNow, the SmartSense rating is represented by a colored meter  displayed on the Incident Details page (see Figure 4-4, "Incident Details Page—Bottom," on page 4-14). The white box in the middle represents a neutral rating. The farther right the black arrow is on the meter, the more positive the rating; the farther left, the more negative. Each time the incident is updated by the end-user or edited by a CSR, the incident is re-indexed to give a current rating (the current thread is weighted more heavily than previous threads). Changed

While SmartSense is an effective tool for estimating an end-user's attitude, be aware that it may not always provide an accurate rating. For example, if a word has several meanings, the SmartSense rating may not be exactly right for one or more of the meanings. Also, if a word is not in the SmartSense list, it will not be considered. Furthermore, sentences containing complex negation or qualification could be misinterpreted by SmartSense.

As a single number, the SmartSense rating may also be an oversimplification. For example, if an end-user writes both positive and negative remarks in an incident (loves the product but expresses anger or frustration about a support issue), the emotive rating may result in a neutral value, since the extreme words will balance each other. Despite these potential difficulties, SmartSense gives a useful overall estimate of emotional level and can help you provide superior service to your end-users.

Note: While the SmartSense word list is proprietary knowledge and cannot be viewed, your RightNow administrator can specify word ratings that extend or override those used in the SmartSense emotive rating system. This allows custom values for words that have specific meanings for a particular company.

Your RightNow administrator can also disable SmartSense. If disabled, the SmartSense calculations are not performed, the rating is not displayed on the Incident Details page or during a Live chat session, and the emotive rating options are not available in workflow and escalation rules. Refer to the *RightNow Web eService Center 5.0 Administration Manual.*

Editing Incidents

You can prepare and send responses to incidents or edit incidents without sending responses. This flexibility enables you to work on an incident in stages while keeping a current record of your work. For example, if an end-user submits a question from the Ask a Question page (accessed from your Support Home page) and then contacts you by phone regarding the issue, you may want to add a note about your conversation or a response based on any new information provided by the end-user.

Changed

The interface for editing incidents has been enhanced to better reflect the work you do and to make it easier for you to work with incidents. From the Editing Incident page you will perform some or all of the following actions on incidents:

- Edit an incident and send a response to the end-user
- Edit an incident but not send a response
- Edit particular fields pertaining to the incident and the end-user
- Add a note about the incident that can be viewed only by other staff members
- Append standard responses to your response
- Append SmartAssistant suggested answers to the response
- Permanently attach a file to an incident that is not sent to the end-user
- Send file attachments to the end-user
- Change the incident status
- Change the staff member the incident is assigned to
- Spell check the incident
- Add billable time to the incident

Additional tools for solving an end-user’s issue are also available when you edit an incident. Refer to “Using Additional Tools to Solve Incidents” on page 4-42 for specific information.

Changed

In this version of RightNow, you can incorporate HTML in incidents with the same functionality as in previous versions. The only change is that you now preview HTML output in incidents from a Web browser. Refer to Chapter 5, “Advanced Editing Features for Incidents,” for information about incorporating HTML in incidents. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for information about incorporating HTML in answers.

To edit and/or respond to an incident:

1. Click Select Action next to the appropriate incident and select Edit.

   Or

   Double-click the summary link on the Incident Console.

Path: > Select Action ***>Edit***

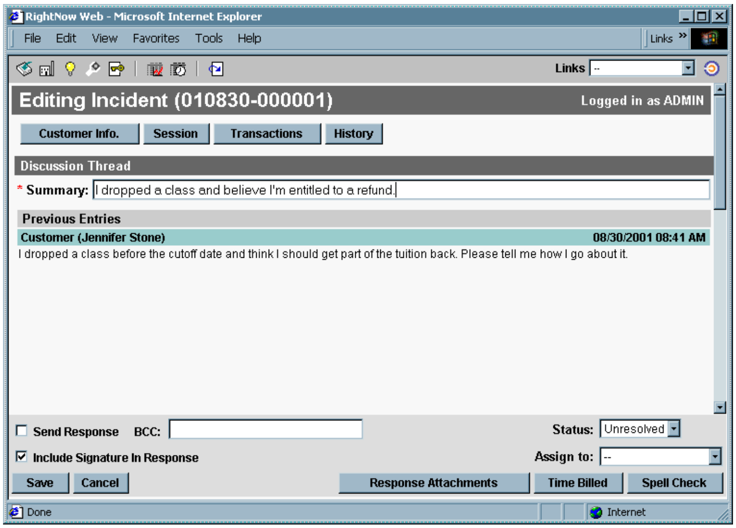


Figure 4-5: Editing Incident Page—Top of Page

The Editing Incident page has been redesigned to make it easier for you to move around. New in this version is the Discussion Thread section, which provides a list of all activities associated with the incident. The information is listed chronologically and contain the question or issue (Summary field), previous entries made by the end-user who submitted the question, and responses and notes added by CSRs. Dates and times of entries are also listed.

Changed

Also new on the Editing Incident page is the BCC field for sending a copy of the incident to an email address. The end-user will not be aware that this incident has been copied to another email address.

2. To view customer information, session data, incident transactions, or incident history, click the appropriate button and see “Using Additional Tools to Solve Incidents” on page 4-42 for procedures to view this additional information.

3. Scroll down the page to access the response/note section.

Path: > Select Action ***>Edit***

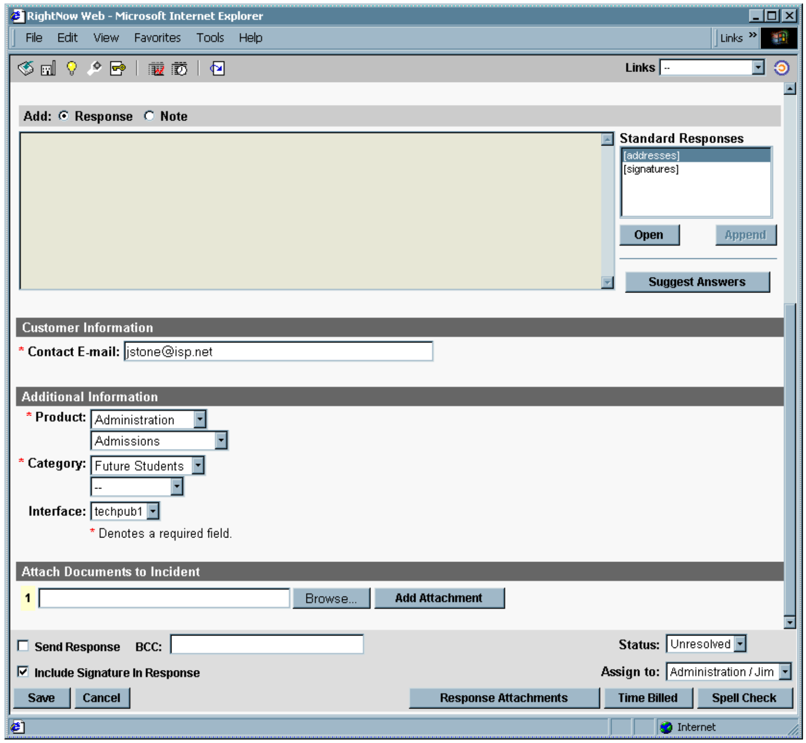


Figure 4-6: Editing Incident Page—Bottom of Page

4. To add a response to the incident, type your response in the Add text box. The Response radio button is selected by default.

Note: If IE_COMMIT_RESP_ON_SEND is enabled (the default), any response you add to the incident is not committed to the permanent incident thread until you send the response (by selecting the Send Response check box). This enables you to change the response thread before sending to the end-user. However, if this configuration setting is not enabled, all response threads, regardless of whether a response is sent to the end-user or not, are committed to the permanent incident thread and cannot be modified.

5. To add a note that is visible only to staff members, select the Note radio button and add the note. Discussion thread can handle very large notes for documentation purposes, which enables you to add as much information as you need to clearly document an incident.

Note: Make sure you select the Note button when adding information that you do not want the end-user to see. If you leave the Response radio button selected by mistake and select the Send Response check box, the note will be sent to the end-user.

6. To append a predefined response to the incident, select a folder in the Standard Responses list and click **Open** to view the available responses in that folder. (The default response is your email signature as defined by your RightNow administrator.)

   Click **Append** after selecting a response to add it to the incident response.

7. To ask SmartAssistant to suggest possible answers for the incident, click **Suggest Answers**. Refer to “Accessing SmartAssistant Suggested Answers” on page 4-27 for instructions on adding a suggested answer.

8. To change the email address of the contact, edit the Contact Email field.

9. Edit any custom field information in the Additional Information section.

10. To attach documents to the incident, refer to “Attaching Files to Incidents” on page 4-31.

11. To send the response to the end-user, select ☐ **Send Response**. The Status Type and Status fields automatically change to Waiting. Also, if the incident is assigned to another staff person, it will be re-assigned to you when you select the Send Response check box.

    Note: The response is sent via email to the email address specified in the Contact Email field. The MAIL_INC_THREAD_LEN configuration setting specifies the number of threads that will be sent in your email response (default is 10).

12. Click **Save** to save your edits.

Table 4-3 describes the fields and buttons on the Editing Incident page beginning with the Discussion Thread. For definitions of the buttons on the top of the page, refer to Table 4-2, “Incident Details Page Field Descriptions,” on page 4-15.

Table 4-3: Editing Incident Page Field Descriptions

Field/Button	Description
Discussion Thread	
Summary	This field contains the one-line summary of the question or issue that the end-user must enter when submitting a question.
Previous Entries	Any updates to the incident that the end-user makes after submitting the question will be displayed in this field.
Response	This field displays any previous responses or notes made by CSRs. If this is a new incident, there will be no Response entries.
Add text box	Type your response or note in this text box after selecting the appropriate radio button.
Response	By default, this radio button is selected to add a response to the end-user’s request or question. All responses will be displayed under Response in the Discussion Thread in the order they were entered.

Table 4-3: Editing Incident Page Field Descriptions (Continued)

Field/Button	Description
Note	Click this radio button to add a note that will be visible only to staff members. All notes are displayed under Response in the discussion thread in the order they were entered. Notes are *never* seen by the end-user and are clearly labeled “Note” in the discussion thread.
Standard Responses	This field lists the response folders that contain predefined standard responses you can append to your incident responses. The default is the signature of the respondent (email address of staff member). Standard responses and response folders are defined by your RightNow administrator.
Open	Click this button to open the selected response folder to view and select a standard response to append to the incident.
Append	Click this button to add the selected standard response to the bottom of the Add text box. For information about response types, refer to the *RightNow Web eService Center 5.0 Administration Manual*.
Suggest Answers	Click this button to ask SmartAssistant to search the knowledge base for applicable solutions to an end-user’s question and link or insert them into the Add text box. For more information on SmartAssistant, refer to “Accessing SmartAssistant Suggested Answers” on page 4-27.
Customer Information	Information in this section consists of the email contact. Any response you send will be sent to the email address specified in this field. This is a required field.
Additional Information	Information in this section consists of any incident custom fields. The number of fields depend on how your RightNow administrator has configured your site. For example, if products and categories have not been defined, these fields will not be displayed in this section.
Attach Documents to Incidents	
file attachment box	Enter the full pathname of the file you want to permanently attach to the incident. Files that are permanently attached to the incident are *not* sent with email responses. For each file you attach to the incident, another file attachment box appears. For more information, refer to “Attaching Files to Incidents” on page 4-31.
Browse...	Click this button to search for a file that you want to add as a permanent attachment to the incident. A selected file will appear in the file attachment box. For more information, refer to “Attaching Files to Incidents” on page 4-31.
Add Attachment	Click this button to add another permanent attachment to the incident. Enter the full pathname of the file or browse for the file. For more information, refer to “Attaching Files to Incidents” on page 4-31.
☐ Send Response	Click this check box to send a response via email to the end-user. When you select this check box, the end-user will receive a response email, and the incident will automatically be set to the Waiting status and the Waiting status type. **Note: You must select this check box or the response will not be sent.**

Table 4-3: Editing Incident Page Field Descriptions (Continued)

Field/Button	**Description**
BCC:	Type an email address in this field to send a copy of the incident to the address specified. The end-user will not be aware that this incident has been copied to another email address.
Status Unresolved	Click this drop-down menu to manually change the incident status. The default statuses are Unresolved, Solved, Updated, and Waiting. Refer to Table 4-2, “Incident Details Page Field Descriptions,” on page 4-15 for default status definitions.
☐ Include Signature In Response	By default, this field is selected. Click this check box to clear the field if you do not want your signature to be included below the text in the response. **Note: Your RightNow administrator will add your signature in your staff account (accessed from Staff Management>Accounts on the Management and Configuration page).**
Assign to Unspecified	Click this drop-down menu to select the staff member you want assigned to this incident. The incident is automatically re-assigned to you when you select the Send Response check box
Save	Click this button to save any additions or changes. The end-user will receive a response only when you select the Send Response check box.
Cancel	Click this button to discard any changes made to the incident and return to the Incident Console.
Response Attachments	Click this button to attach a file to the response sent to the end-user. The file is *not* permanently attached to the incident; it will be sent with the response one time only. For more information, refer to “Attaching Files to Incidents” on page 4-31.
Time Billed	Click this button to add billable time to an incident. **Note: By default, the Time Billed feature is disabled. Your RightNow administrator must enable this feature for the Time Billed button to appear. For more information, refer to “Tracking Time Spent on Incidents” on page 4-37.**
Spell Check	Click this button to check the spelling of any text you entered in the response, note, or any custom field. For more information, refer to “Spell Checking Text” on page 4-40.

Incident Locking

Incident locking prevents staff members and end-users from overwriting one another's work. The Incident Locking feature displays a warning to staff members and end-users when they attempt to update or respond to an incident when someone else is editing the same incident.

Note: Your RightNow administrator can specify the length of time (in hours) that a lock exists before it expires (RNW User Interface>Incidents>Incident Lock>INC_LOCK_EXP). When a lock expires, the lock is deleted. If INC_LOCK_EXP is set to zero, then a lock will never expire; however, all locks expire whenever the utility *dbstatus* runs.

Instances when the Incident Locked warning will appear include:

- When a CSR attempts to edit an incident and another CSR is currently editing the same incident.
- When a CSR attempts to edit an incident and an end-user is currently updating the same incident.
- When an end-user attempts to update an incident, through the link in the response email or through My Stuff, and a CSR is currently editing the same incident.

Example:

When staff member Admin selects Edit from the Select Action drop-down menu next to an incident, a lock is placed on that incident. When a second staff member, Tom, attempts to edit the same incident, Tom is warned of the existing lock on the incident. The warning states that Admin has been editing or responding to the incident and how long Admin has been working on the incident. Tom can choose to override the lock or cancel the operation.

Path:  > Select Action > ***Edit***

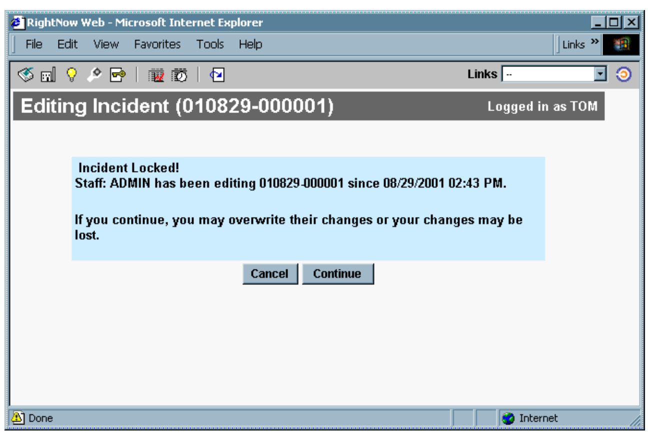


Figure 4-7: Editing Incident Page—Incident Locked

If Tom clicks Cancel, the operation is terminated, no overwrites are made, and the Incident Details page for the incident opens.

If Tom clicks **Continue**, he will take ownership of the lock. When Admin then tries to save the changes, a warning informs Admin that the incident is locked, and that Tom is editing the incident or that changes have been made since Admin started editing the incident. Staff member Tom now owns the lock.

Path: > Select Action ***>Edit>*** Save

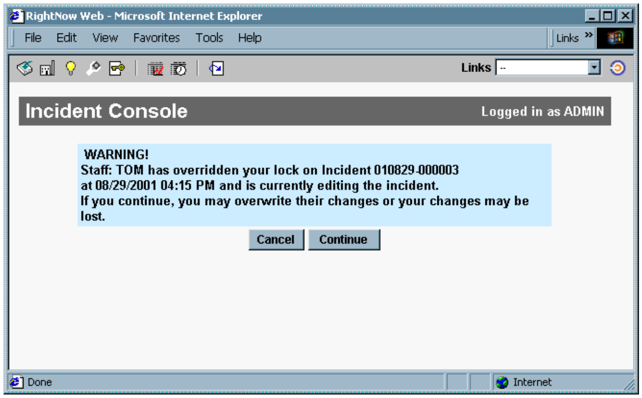


Figure 4-8: Editing Incident Page—Lock Override

Each time a staff member attempts to edit an incident, the incident is checked to determine whether a lock exists. In addition, each time a staff member attempts to save or send an incident response, the incident is checked to see whether the staff member still owns the lock or if the lock is now owned by someone else.

The same warning will be displayed when a staff member attempts to edit an incident and an end-user is currently updating the same incident.

Path: > Select Action ***>Edit>*** Save

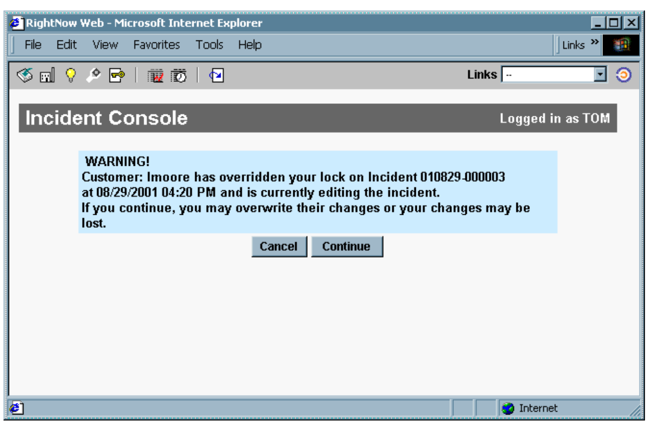


Figure 4-9: Editing Incident Page—Incident Locked Warning

Each time an end-user attempts to update an incident through My Stuff or via the link in the response email, the incident is checked to see if a lock exists. When the end-user attempts to save the changes (clicks **Update Question**), the incident is again checked to see whether the end-user still owns the lock or whether the lock is now owned by someone else.

Path: Support Home>My Stuff>Questions>Summary Link> **Update Question**

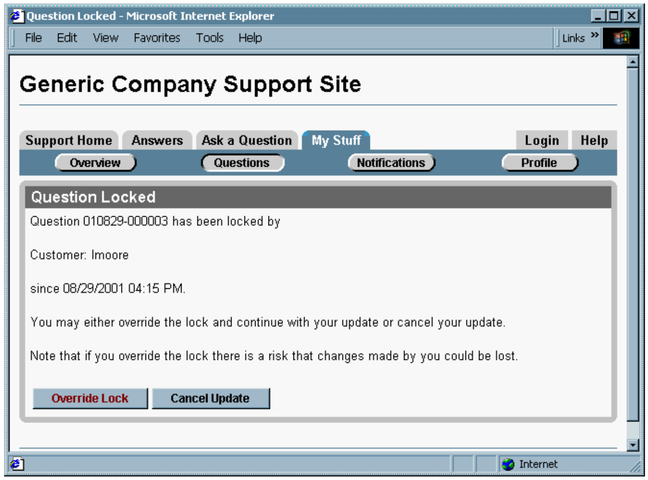


Figure 4-10: My Questions Page—Question Locked

Accessing SmartAssistant Suggested Answers

RightNow's SmartAssistant can search the knowledge base and suggest possible answers to an incident you are editing. SmartAssistant returns suggested answers that you can either insert as text or as a link in the incident response. If you insert the text of suggested answers, the end-user will receive an email with a response that looks like you responded to the incident directly. (Refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information about SmartAssistant.)

To access SmartAssistant suggested answers:

1. Open the Editing Incident page for the appropriate incident.

2. Scroll down to display the response section and click **Suggest Answers**. A list of possible answers will be displayed.

Path: > Select Action > ***Edit>*** **Suggest Answers**

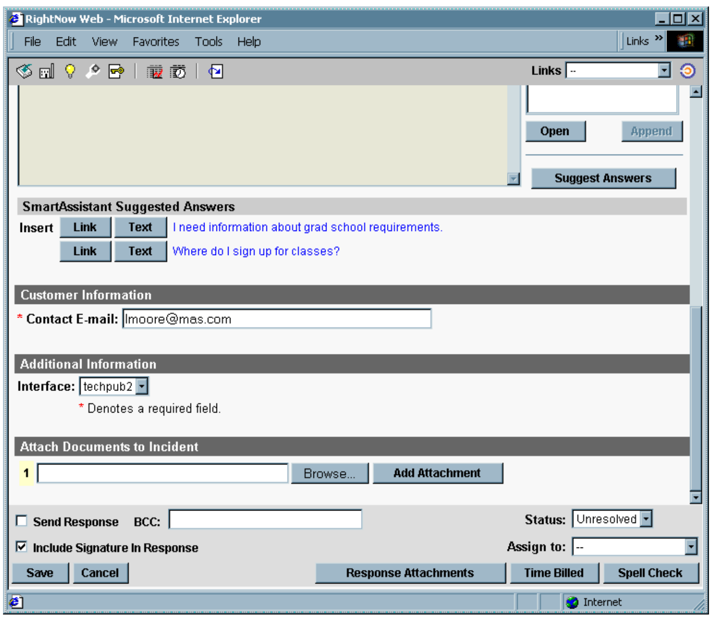


Figure 4-11: SmartAssistant Suggested Answers on Editing Incident Page

Note: The number of suggested answers returned depends on the size of your knowledge base and how answers are indexed for keywords. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for details.

3. To view an answer suggested by SmartAssistant, click one of the links. A new Web browser will open and display the details of the suggested answer.

Path: > Select Action >***Edit>*** Suggest Answers ***>Suggested Answer Link***

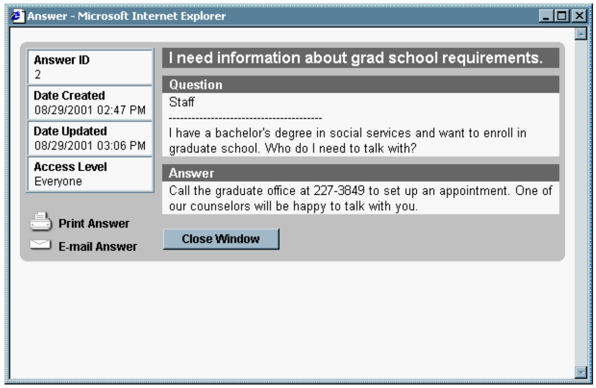


Figure 4-12: SmartAssistant Suggested Answer Details

4. Click Close Window after viewing the answer to return to the Editing Incident page and the list of suggested answers.

5. To view another answer, click the answer link.

6. To add a suggested answer as a link in your response, click **Link** next to the appropriate answer. If you choose to send the response to the end-user, they will receive an email with a link to the suggested answer.

   Note: Using a suggested answer will increase the answer's solved count. For more information on solved count, refer to "Solved Count and Score" on page 3-33.

Path: > Select Action ***>Edit>*** Suggest Answers > Link

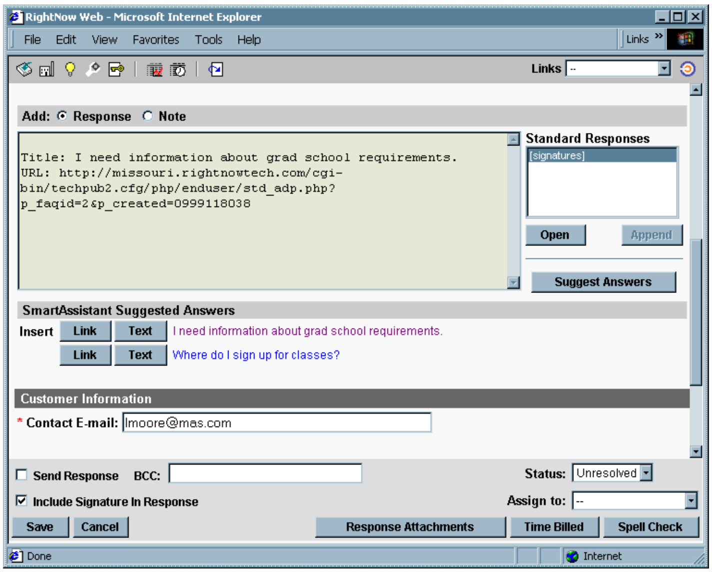


Figure 4-13: Editing Incident—Suggested Answer Link Added to Response

7. To insert the text of a suggested answer in the incident response, click **Text**. (This will also increase the solved count of the suggested answer.)

Path: > Select Action > ***Edit*>** **Suggest Answers** > **Text**

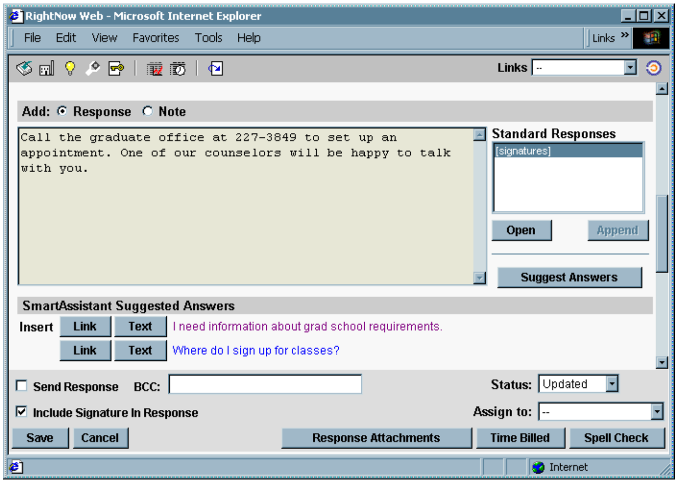


Figure 4-14: Editing Incident—Suggested Answer Text Added to Response

Note: You can edit any text you insert in the response.

8. To send the response to the end-user, select **Send Response** and then click **Save**. When you send a response, eService Center 5.0 automatically sets the incident status and status type to Waiting.

9. To save the suggested answer in the response without sending the response to the end-user, click **Save**.

Attaching Files to Incidents

RightNow allows you and your end-users to attach files to incidents. You can permanently attach files to an incident that will not be sent with the response and also send files with incident responses. (End-users can attach up to ten files when they submit a question from the Ask a Question page.)

Note: "Permanently attached" means that a file is attached to an incident, but is not sent with the incident response. A permanently attached file can be deleted from the Incident Details page.

As you respond to incidents, you can attach and send files in the following ways:

- Permanently attach a file to an incident—A permanently attached file is *not* sent with any CSR response or end-user update. The end-user accesses the file through My Stuff; CSRs access the files from the Incident Details page. This permits email messages to be sent quickly without the load of file attachments and also keeps the files in one location for reference. Refer to "To permanently attach a file to an incident:" on page 4-32.
- Send a file with an incident response—Sending a file with an incident response is a one-time function that attaches a file to the email message. End-users can access the file directly from their email client rather than logging in to My Stuff through a Web browser. Refer to "To send a file with an incident response:" on page 4-34.
- Send a file with an incident response that an end-user originally attached to the support request—Each file that end-users send with their original request becomes permanently attached to the incident. You can send those files back to the end-users using the Response Attachments feature (refer to "To send a file with an incident response:" on page 4-34). End-users can then access the file directly from their email client rather than logging into My Stuff through a Web browser.

The (default) maximum size for a file attachment is 500,000 bytes (500 KB or.5 MB). For information on changing the maximum file size, disabling and enabling file attachments, and discarding certain file types, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Instructions follow for permanently attaching a file to an incident that will not be sent with the incident response and sending a file with an incident response.

To permanently attach a file to an incident:

1. Open the Editing Incident page for the appropriate incident.
2. Scroll down to the Attach Documents to Incident section.
3. Click Browse... to select the file you want to attach.

Path: > Select Action ***>Edit>*** Browse...

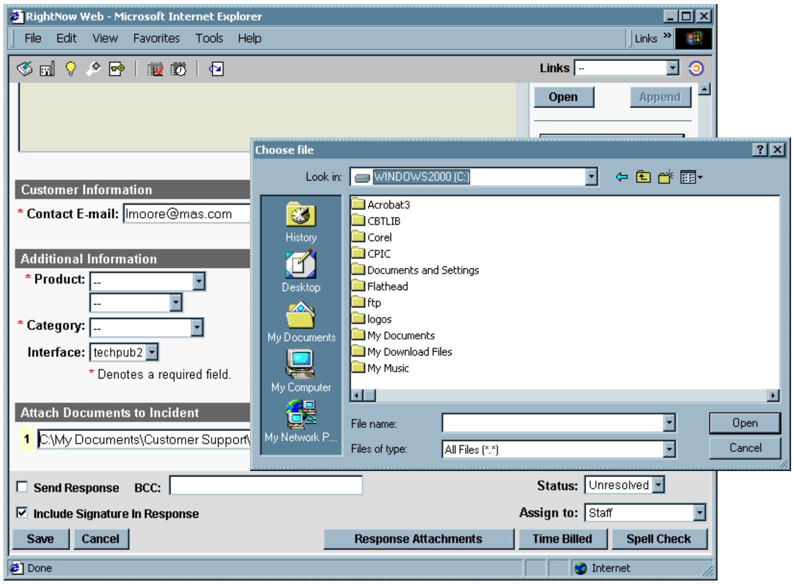


Figure 4-15: Editing Incident Page—Browse for File Attachment

4. Select the file you want to attach and click Open on the Choose File window. The filename will be displayed in the file attachment box.
5. Click Add Attachment to permanently attach the file to the incident.

Path: > Select Action ***>Edit>*** Browse... > Add Attachment

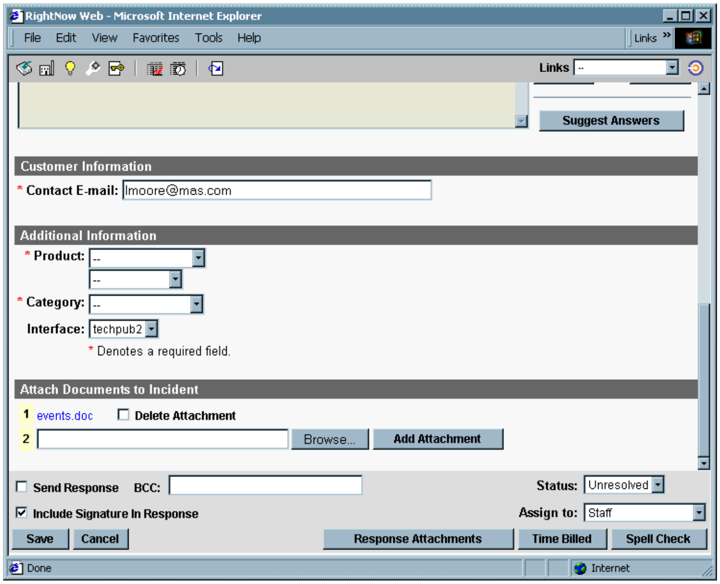


Figure 4-16: Editing Incident Page—Attachment Added

6. To add an additional attachment, click Browse... and repeat step 4 and step 5.

Note: Each file you permanently attach to the incident will be numbered and displayed as a link under Attach Documents to Incident. The incident shown in Figure 4-16 contains one permanently attached file, events.doc.

7. To permanently attach the file(s) to the incident *and* send a response to the end-user, select ☐ Send Response and then click Save.

8. To permanently attach the file(s) to the incident without sending a response to the end-user, click Save.

Note: Remember that permanently attached files are not sent with the incident response. End-users can access the permanently attached files through My Stuff (see Chapter 3, “End-User Pages”).

To send a file with an incident response:

1. Open the Editing Incident page for the appropriate incident.
2. Scroll down to the Attach Documents to Incident section.

Path:  > [Select Action] ***>Edit***

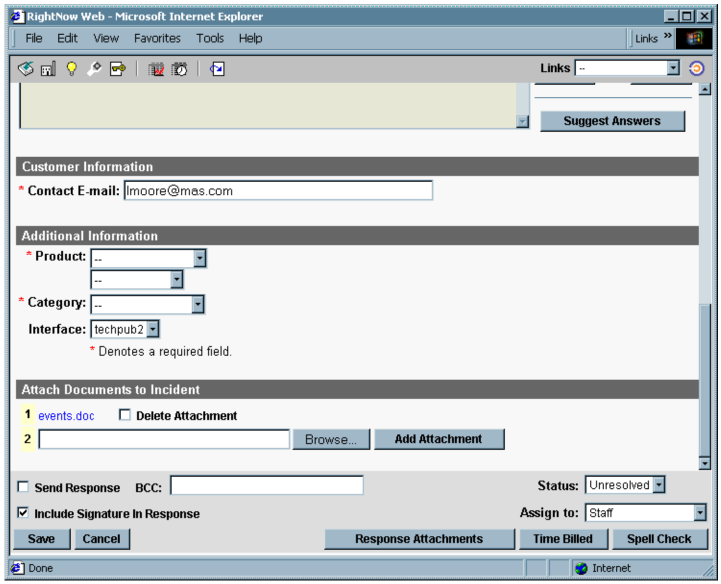


Figure 4-17: Editing Incident Page after Attaching a File

Note: The incident shown in Figure 4-17 contains one permanently attached file, events.doc.

3. Click [**Response Attachments**] to open the Select Attachments To Send page.

Path: > Select Action > ***Edit*** > Response Attachments

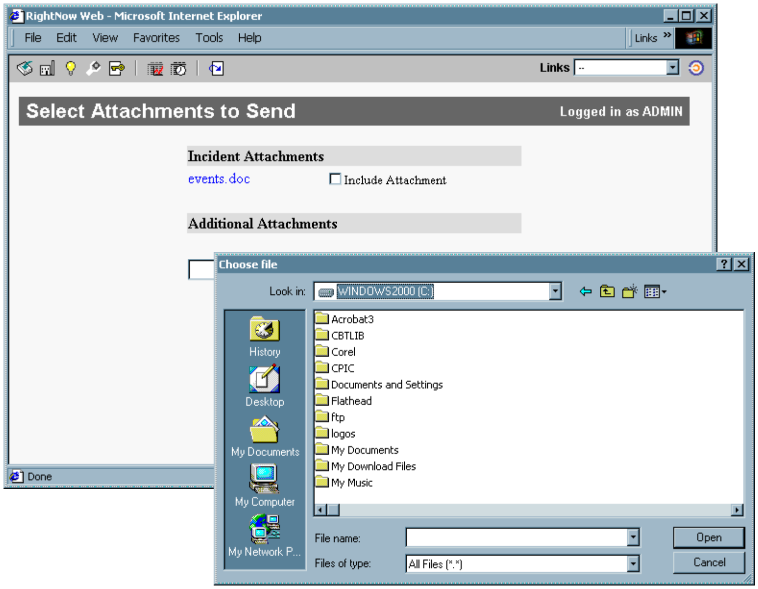


Figure 4-18: Select Attachments To Send Page

Note: Any permanently attached files are displayed under Incident Attachments. Figure 4-18 shows one permanently attached file.

4. To send a file that is not currently attached to the incident, click Browse... .

5. Select the file you want to send and click Open on the Choose File window. The filename will be displayed under the Additional Attachments column.

Path: > Select Action >***Edit***> Response Attachments > Browse... > Open

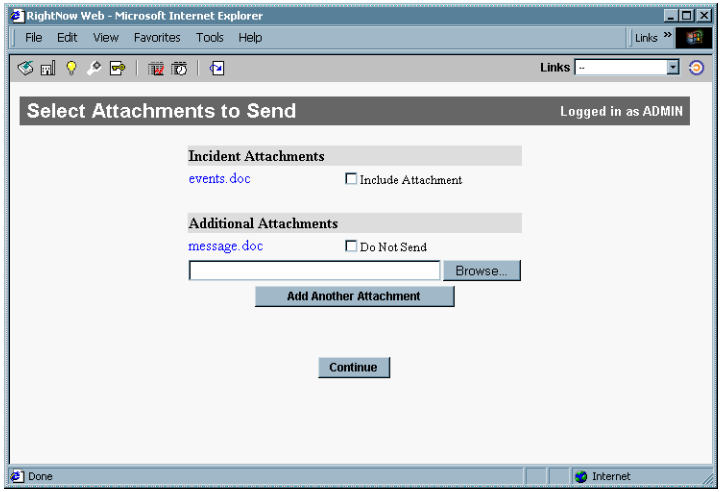


Figure 4-19: Additional Attachments Added

Note: The example in Figure 4-19 contains one permanently attached file, events.doc, that will *not* be sent with the response. It also contains one response attachment, message.doc, that will be sent with the response. The response attachment will not be permanently attached to the incident; it will be sent just one time with this response.

6. To add additional response attachments, click **Add Another Attachment**. When you click this button, the file in the Browse box is moved under Additional Attachments. The last response attachment added is displayed in the Browse box.

7. To stop a response attachment from being sent, select ☐ Do Not Send.

8. To send a file that is permanently attached to the incident, select ☐ Include Attachment next to the desired file. A copy of the file will be sent with the response, and the original will remain permanently attached to the incident.

9. Click **Continue** to attach the file(s) to the incident response. You will return to the Editing Incident page.

10. To send your response and the files you attached, click ☐ **Send Response** and then click **Save**.

Note: Only the files attached to the incident through Response Attachments will be sent with the incident response. The files listed on the Editing Incident page are permanently attached to the incident. To view a list of the files that will be sent with the response, select **Response Attachments** to open the Select Attachments To Send page.

Tracking Time Spent on Incidents

You can track the time you spend servicing end-users' questions and also edit or delete time billed entries for incidents. Your RightNow administrator can then use the time billed information for staffing purposes by comparing the support staff's available time to the incident load.

Note: By default, the Time Billed feature is disabled. Your RightNow administrator must enable Time Billed for it to be available. Your RightNow administrator can also configure eService Center 5.0 so that time billed *must* be added to an incident before the status of the incident can be changed to Solved. For information on configuring Time Billed, refer to the *RightNow Web eService Center 5.0 Administration Manual*. For a description of the Time Billed Report, refer to the *RightNow Web eService Center 5.0 Reference Manual*.

This section contains instructions for entering time billed information to an incident and editing time billed entries.

To enter time billed for an incident:

1. Select Time Billed from the Select Action drop-down menu next to the appropriate incident. (You can also add billable time to incidents from the Editing Incident and Add New Incident pages.)

Path: > Select Action ***>Time Billed***

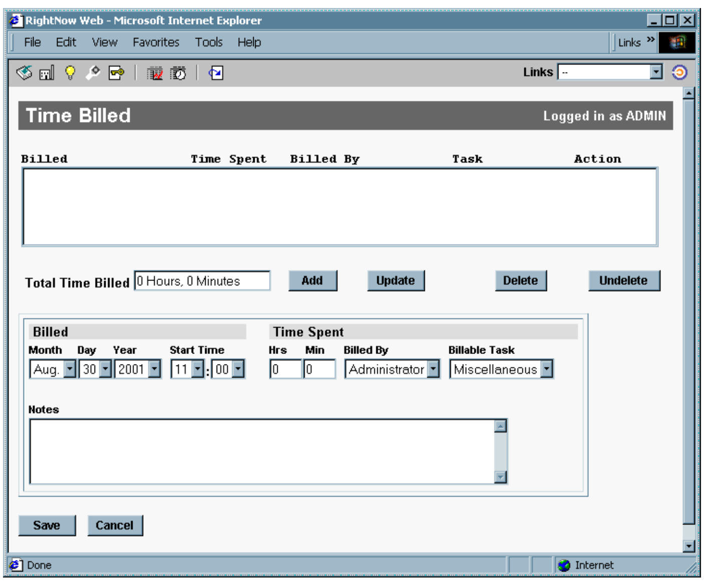


Figure 4-20: Time Billed Page

2. Under the Billed column, enter the date when the work was performed by clicking the Month, Day, and Year drop-down menus. Enter the time of day that the work was performed by clicking on the Start Time drop-down menus.

3. Under the Time Spent column, place your cursor in the Hrs. or Min. box to enter the amount of time spent working on the incident.
4. Click the Billed By drop-down menu to select the group or staff member who is working on the incident.
5. Select the task performed from the Billable Task drop-down menu (miscellaneous is the default). For information about adding billable tasks, refer to the *RightNow Web eService Center 5.0 Administration Manual*.
6. To add a note to the time billed entry, type the note in the Notes field.

   Note: You must enter your note before you click Add; otherwise, the note will not be saved.

7. Click Add to add the time billed entry and the note.
8. Click Save to save the time billed entry. You will return to the Incident Console.

Note: If you access the Time Billed function from another page, such as the Incident Details or Editing Incident page, you will return to that page.

To edit or delete time billed entries for an incident:

1. Select Time Billed from the Select Action drop-down menu next to the appropriate incident.

Path: > Select Action > ***Time Billed***

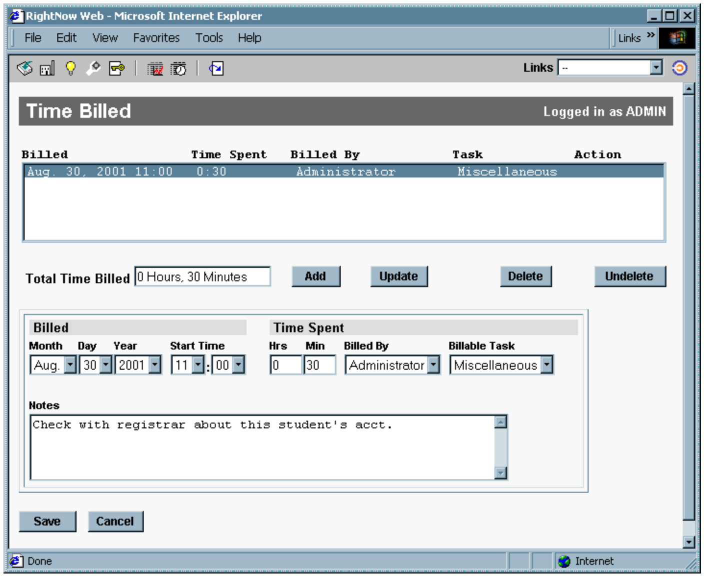


Figure 4-21: Updating Time Billed Entry

2. Highlight the entry you want to edit or delete.

   Note: Notes are linked to the time billed entry; therefore, you must highlight an entry for any notes to be visible.

3. Make any changes in the date, start time, hours/minutes, billed by, and billable fields.

4. To edit the note associated with a time billed entry, highlight the entry, then place your cursor in the Notes field and make the necessary changes.

5. Click Update to update the time billed entry and the notes field. The updated time billed information will be shown in the top display panel.

   Note: Make sure you edit the note before you click Update. If you edit the note after you click Update, your edits will not be saved.

6. Click Save to save your changes. You will return to the Incident Console.

7. To delete a time billed entry and the associated note, highlight the entry, click Delete, and click Save to delete the entry.

Spell Checking Text

The Spell Check function is available when adding, editing, or responding to an incident. Spell check verifies the correct spelling of text in the Summary, Discussion Thread, and custom field text areas.

Note: Your RightNow administrator can view, add, and remove words from the dictionary word list to customize the Spell Check function. This enables your organization to customize the spell check dictionary to include words specific to your company. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for details.

To spell check an incident:

1. Click **Spell Check** on the Editing Incident page or the Add New Incident page to open the Spell Checking Response window.

Path: > Select Action > ***Edit*** > **Spell Check**

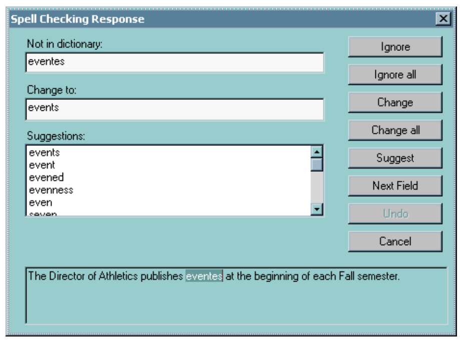


Figure 4-22: Spell Checking Response Window

Note: If there are no spelling errors in any of the text areas, the Spell Checking Response window will *not* appear.

2. Click the appropriate button on the Spell Checking Response window as each misspelled word is highlighted. For a description of each button, refer to Table 4-4. The window will close when all text has been checked.

   Note: This function will *not* find incorrectly spelled capitalized words, or sentences that begin with a lowercase letter.

Table 4-4: Spell Checking Response Window Function Descriptions

Function	Definition
Ignore	Click this button to ignore this instance of the word.
Ignore all	Click this button to ignore all instances of this spelling of the word.

Table 4-4: Spell Checking Response Window Function Descriptions (Continued)

Function	Definition
Change	Click this button to accept the spelling of the word listed in the Change To box.
Change all	Click this button to change all instances of the misspelled word to the suggestion listed in the Change To box.
Suggest	Click this button if you are unsure of the spelling of the word and you want a suggestion.
Next Field	Click this button to skip from the current text box area to the next.
Undo	Click this button to undo the last change.
Cancel	Click this button to cancel the spell check function and close the Spell Checking Response window.

Using Additional Tools to Solve Incidents

In eService Center 5.0, you have a variety of tools to help you answer your end-users' questions. When you edit an incident or just view the incident's details, you can also view information about the end-user, the other questions the end-user has submitted, what pages the end-user accessed before submitting the question, and what actions have been taken on the incident by the end-user and other CSRs.

This section describes the additional tools for answering end-users' questions. Access these tools from the Select Action drop-down menu on the Incident Console or the Incident Details or Editing Incident pages.

Viewing Customer Information

The Customer Details page displays information about end-users and their associated company. The default customer fields that are displayed are the end-user's email address, first and last name, user ID, and password. The default company fields displayed are the associated company's name, contact, ID and password, and access levels of answers in Privileged Access. The active contracts issued to the end-user will also be listed if the Contracts module has been enabled (see the *RightNow Web eService Center 5.0 Administration Manual* for details).

To view customer information:

1. Select Display Customer from the Select Action drop-down menu next to the appropriate incident.

Path: > Select Action ***>Display Customer***

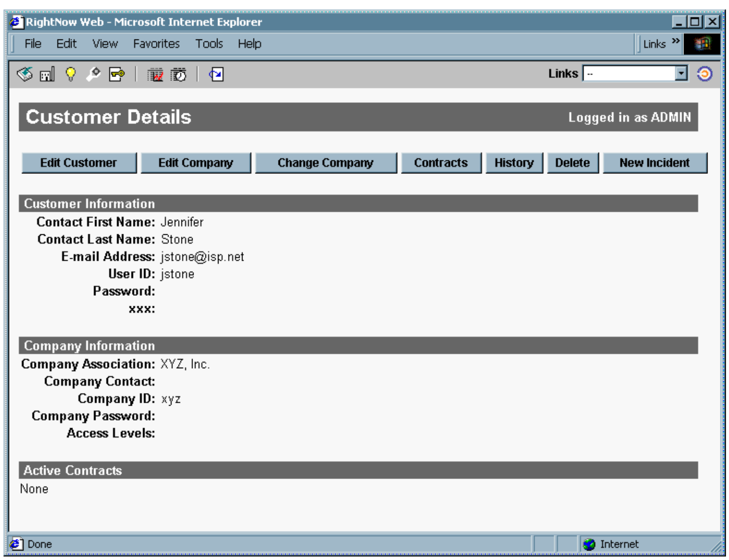


Figure 4-23: Customer Details Page

2. Click to return to the Incident Console.

Viewing a Customer Session

RightNow tracks and records all actions performed by end-users from your support site prior to when they submit a question. Customer session information records such actions as performing keyword searches to locate answers, viewing My Stuff, submitting feedback on answers, and viewing related answers.

Customer session information provides you with a detailed account of how end-users are using your site; you can see what information end-users search for and which answers they view. This information can help you craft your answers more specifically, organize your products and categories, and effectively maintain your knowledge base.

To view the customer session:

1. From the Editing Incident page or the Incident Details page, click **Session** .

Note: This button is displayed only when the end-user asks a question from the Ask a Question page. If the end-user submits a request through email, there will be no customer session information to view.

Path: > Select Action ***>Edit>*** **Session**

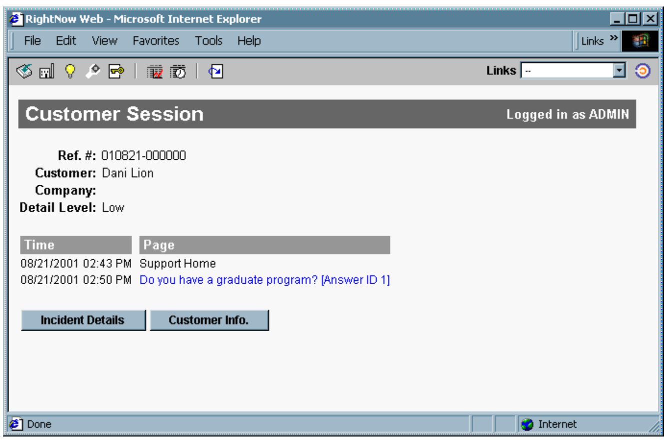


Figure 4-24: Customer Session Page

The Customer Session page displays the drop-down menu searches and the keyword searches that the end-user performed and the answers viewed. This page also shows if an end-user used related solutions and if the end-user submitted any site feedback or a rating on any answer (“How well did this answer your question?” on the Answer page).

The date, time, and description of each activity is displayed in the order that the end-user performed them. Your RightNow administrator can set the level of detail recorded in the Customer Session through RNW User Interface>Incidents>Customer Session> CS_DETAIL_LEVEL. There are three levels of detail: low, medium, and high. Each level builds on the information recorded in the previous level. The following list shows three activities that an end-user might perform and the corresponding detail level:

- An end-user views the list of answers in your knowledge base—this is a low detail level activity.
- While viewing the details of a specific answer, the end-user clicks the Related button—this is a medium detail level activity.
- Finally, the end-users clicks Ask a Question to submit a question—this is a high detail level activity.

The following activities and functions are reported within each level:

Low Detail Level

Support Home opened (Support Home)

Answers viewed (subject link and reference number)

Medium Detail Level

Answer search (Answers—search text, search by, sort by, page number, products, and categories)

Answers search using Related Answers (Related Answers list)

Related answers viewed from Related Answers (Related solution—subject link and reference number)

Answer submitted to the feedback question: Did this solve your issue? (Solution rating—subject link and reference number)

User Login (Login)

My Stuff page opened (My Stuff)

Live chat requested

High Detail Level

Notify on change for an answer selected (Solution Watch)

Search help files accessed (RNW Search Help)

Help files accessed (RNW General Help)

Site feedback submitted (RNW Site Feedback)

Ask a Question request submitted (Ask a Question)

2. After viewing session data, click **Incident Details** or **Customer Info.** to access the Incident Details page or the Customer Details page. You can also close the window to return to the Editing Incident page.

Viewing Incident Transactions

RightNow automatically tracks all actions performed on incidents by end-users, the customer support staff, and your RightNow system. The Transactions page displays the date and time the action was taken, the transaction type, the person who performed the action, and a description of the transaction.

An incident's transactions record allows you to see who has been working on the incident, when responses were sent, and when the end-user updated the incident. This information is valuable for keeping track of support interactions with end-users, especially if more than one CSR is working on the same incident.

Transactions information also displays any system actions that have been performed, such as escalation rules, workflow rules, and when an incident status is automatically changed from Waiting to Solved or from Unresolved to Updated. This information is useful for you and your RightNow administrator when designing and maintaining system rules and configuration settings.

To view incident transactions:

1. Select Transactions from the Select Action drop-down menu next to the appropriate incident. (You can also access incident transactions from the Incident Details page and the Editing Incident page.)

Path: > Select Action >***Transactions***

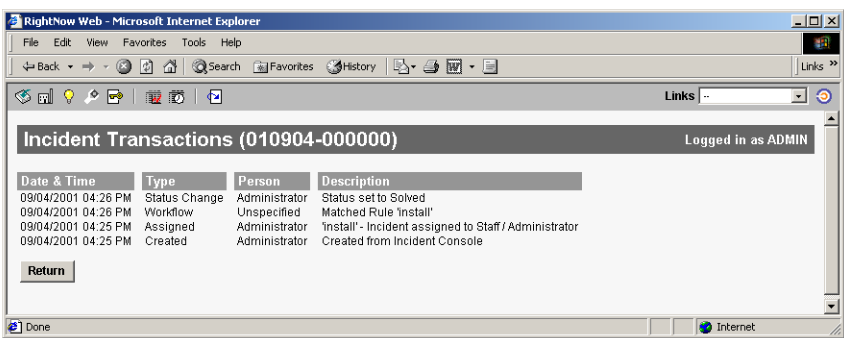


Figure 4-25: Incident Transactions Page

Note: You can also add notes to an incident to record actions that are not automatically recorded by eService Center 5.0. For example, if an end-user contacts you by phone, you can include a note in the incident documenting the conversation. Refer to "Editing Incidents" on page 4-18 for instructions on adding a note in an incident.

A transaction entry consists of the following fields:

Date & Time—This column shows the date (mm/dd/yy) and time of the transaction.

Type—Refer to Table 4-5 for transaction types descriptions.

Person—This column shows who performed the action, either the name of the staff member or Unspecified. Unspecified means the action was performed by an end-user or by eService Center 5.0.

Description—Refer to Table 4-5.

Table 4-5 defines the transaction types and descriptions used in RightNow.

Table 4-5: Definitions of Transaction Types and Descriptions

Type	Description	Definition
Created	Incident created by USER	An end-user submitted the incident from the Ask a Question page.
	Created at Incident Console	A staff member created the incident from the Incident Console or Customer Console.
Email Received	Incident created by USER	An end-user submitted the incident via email.
Workflow	Matched Rule <name>	The incident matched the workflow rule named and the actions were performed.
Edited	Incident Edited	A staff member edited the incident.
Assigned	Incident Assigned to <staff name>	A staff member assigned the incident to another staff member.
Escalated	Escalated	The incident matched an escalation rule and the escalation actions were performed.
	Escalated, x of y actions failed	The incident matched an escalation rule and a number (x) of the total number of escalation actions failed (y).
Time Billed	Modified Time Billed	A staff member modified or entered the time billed.
Response Sent	Response sent to <email address>	A response was sent to the email address named.
	Unable to send response to <email address>	A response could not be sent to the email address named. The cause could be an incorrect email user name, an incorrect domain name, or a mail server error.
	Message type disabled - response not sent	An email message could not be sent because the email message type is disabled in Email Messages on the Management and Configuration page.

Table 4-5: Definitions of Transaction Types and Descriptions (Continued)

Type	Description	Definition
Response Received	Incident updated by USER	The end-user updated the incident through My Stuff, via the link in the email response, or by replying to the email response.
Status Change	Status set to <status>	A staff member changed the status to the status named.
	Status set to Solved by SYSTEM	The system set the status to Solved. RightNow automatically changes the incident status from Waiting to Solved as defined in Age Database Batch Utility>Batch Processing> CI_HOURS.
	Status set to Solved by USER	The end-user set the incident to Solved through My Stuff or via the link in the email response sent.
	Status set to Updated by SYSTEM	The end-user updated the incident through My Stuff.

2. Click Return to return to the Incident Console.

Viewing an End-User's Incident History

The History page displays a record of all the incidents submitted by the end-user who submitted the incident you are currently viewing. You can also view the incidents from the end-user's associated company if the end-user is associated with a company (see Chapter 8, "Customer Console").

To view an end-user's incident history:

1. Select Customer History from the Select Action drop-down menu next to the appropriate incident.

Path:  > Select Action > ***Customer History***

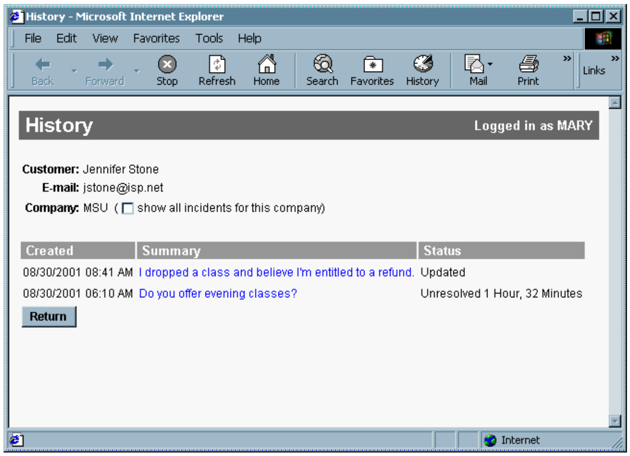


Figure 4-26: End-User's Incident History Page

2. To show all incidents for the company the end-user is associated with, select (☐ show all incidents for this company) .

3. Click **Return** to return to the Incident Console.

Adding Incidents to the Knowledge Base

Incidents are generally submitted by end-users from the Ask A Question page or through email; however, there may be times when you need to add incidents. For example, occasionally an end-user will contact your support staff by phone, U.S. mail, or fax. In order to have a record of the issue and to track its progress, you can create an incident within RightNow. This allows you to centralize your customer support records into one database as well as route your end-users to your support site.

In addition to adding incidents from the Incident Console, you can also add incidents from the Customer Console. The steps for adding incidents from the Customer Console are the same except that you begin on the Customer Console. Adding an incident from a customer record enables you to associate the incident with a specific end-user in your database and also apply the incident to a contract currently issued to that end-user.

Note: Your RightNow administrator can also import incidents into the knowledge base using RightNow's *kimport* utility. For more information on importing, refer to the ***RightNow Web*** *eService Center 5.0 Administration Manual*.

To add an incident from the Customer Console:

1. Click [Select Action] next to the appropriate customer and select New Incident. You will open the Add New Incident page.
2. See "To add incidents through the Incident Console:" on page 4-50 for instructions on creating an incident.

To add incidents through the Incident Console:

Changed

1. Click **New Incident** to open the Add New Incident page. Refer to Table 4-6, “Add New Incident Page Field Descriptions,” on page 4-52 for field descriptions.

Path: > **New Incident**

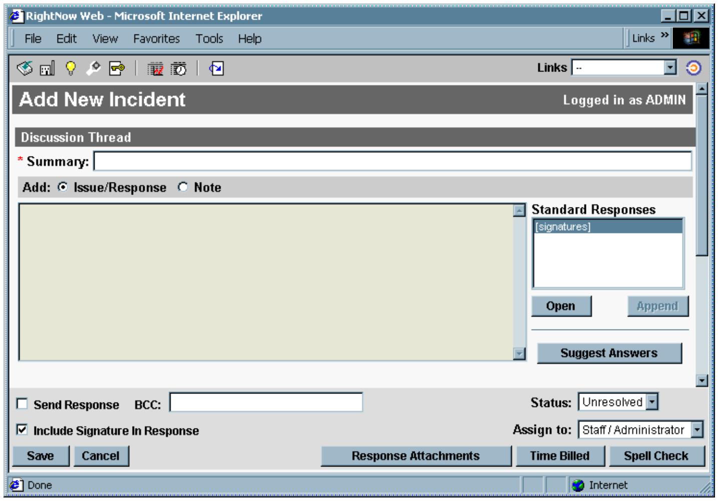


Figure 4-27: Add New Incident Page—Top

Note: Required fields are flagged with an asterisk (*).

2. Type the complete question or issue in the Summary field.

3. Make an entry in the Add text box. You can cut and paste information into the text box from another Web browser window or a word processing program. You must add an issue/response when adding an incident; if you attempt to save the incident without making an entry, a pop-up message will inform you that a value in this field is required.

Note: If IE_COMMIT_RESP_ON_SEND is enabled (the default), any response you add to the incident is not committed to the permanent incident thread until you send the response (by selecting the Send Response check box). This enables you to change the response thread before sending to the end-user. However, if this configuration setting is not enabled, all response threads, regardless of whether a response is sent to the end-user or not, are committed to the permanent incident thread and cannot be modified.

4. To add a note that is visible only to other staff members, click the Note radio button and type the note in the text box.

Note: Make sure you select the Note button when adding information that you do not want the end-user to see. If you leave the Issue/Response radio button selected by mistake and select the Send Response check box, the note will be sent to the end-user.

5. To ask SmartAssistant to suggest possible answers for the incident, click **Suggest Answers**. Refer to “Accessing SmartAssistant Suggested Answers” on page 4-27.

6. To append a predefined response to the incident, select a folder in the Standard Responses list and click Open to view the available responses in that folder. (The default response is your email signature as defined by your RightNow administrator.)

Click Append after selecting a response to add it to the incident response.

Path: > New Incident

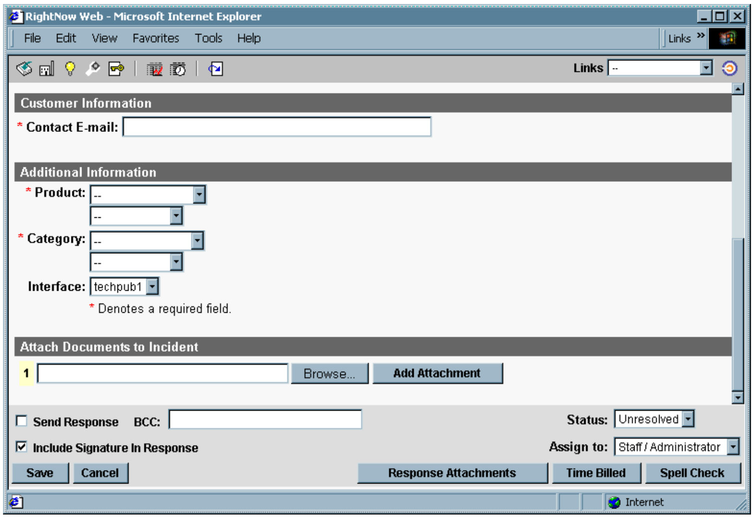


Figure 4-28: Add New Incident Page—Bottom

7. Add the email address of the contact in the Contact Email field.

8. Fill in the fields in the Additional Information section. The number of fields in this section depend on how your RightNow administrator has configured your site.

9. If your site has multiple interfaces, select the interface where this incident will appear.

10. To attach a file to the incident, see “Attaching Files to Incidents” on page 4-31.

11. Select the incident status and the staff member you want assigned to the incident.

12. Click Save to store the new incident in the knowledge base. You will return to the Incident Console.

Table 4-6 describes the fields and buttons on the Add New Incident page.

Table 4-6: Add New Incident Page Field Descriptions

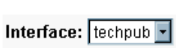
Field/Button	Description
Discussion Thread	
Summary	Type a one-line summary of the incident. This is a required field.
Add radio buttons	This field displays two radio buttons: Issue/Response and Note.
Issue/Response	Add a response to the issue listed in the Summary field. When you add an incident, you must make an entry in this field; otherwise, you cannot add the incident to the knowledge base.
Note	Click this radio button to add a note that will be visible only to staff members. For example, you could add a complete description of the incident or problem or add comments about a conversation with the end-user.
Add text box	Type the response or note in this text box.
Standard Responses	This field lists the response folders that contain predefined standard responses you can append to your incident responses. The default is the signature of the respondent (email address of staff member). Standard responses and response folders are defined by your RightNow administrator.
	Click this button to open the selected response folder to view and select a standard response to append to the incident.
	Click this button to add the selected standard response to the bottom of the Add text box. For information about response types, refer to the *RightNow Web eService Center 5.0 Administration Manual*.
	Click this button to ask SmartAssistant to search the knowledge base for applicable solutions to this issue and link or insert them in the Response box. Refer to “Accessing SmartAssistant Suggested Answers” on page 4-27.
Contact Email	Type the email address of the person you want to receive the email response.
Additional Information	Information in this section consists of any incident custom fields. The number of fields depend on how your RightNow administrator has configured your site. For example, if products and categories have not been defined, these fields will not be displayed in this section.
	If your RightNow application has multiple interfaces, click this drop-down menu to select the interface where the incident will appear. The default is the interface you are currently working on.
Attach Documents to Incidents	
file attachment box	Enter the full pathname of the file you want to permanently attach to the incident. Files that are permanently attached to the incident are *not* sent with email responses. Refer to “Attaching Files to Incidents” on page 4-31.

Table 4-6: Add New Incident Page Field Descriptions (Continued)

Field/Button	Description
Browse...	Click this button to search for a file that you want to add as a permanent attachment to the incident. The selected file will appear in the text box.
Add Attachment	Click this button to add another permanent attachment to the incident. Enter the full pathname of the file or browse for the file.
Send Response	Select this check box to send a response via email to the address specified in the Contact Email field. The end-user will receive a response email, and the incident status type and status will automatically be set to Waiting.
BCC:	Type the email address of the individual you want to receive a copy of this incident.
Status Unresolved	Click this drop-down menu to select a status. The default statuses are Unresolved, Solved, Updated, and Waiting. Refer to Table 4-2, “Incident Details Page Field Descriptions,” on page 4-15 for default status definitions.
☐ Include Signature In Response	By default, this field is selected. Click this check box to clear the field if you do not want your signature to be included below the text in the response. **Note: Your administrator will add your signature in your staff account (accessed from Staff Management>Accounts on the Management and Configuration page).**
Assign to Unspecified	Click this drop-down menu to select a staff member and/or group to assign to the incident.
Save	Click this button to save your changes. The end-user will receive a response only when you select the Send Response check box.
Cancel	Click this button to cancel the new incident and return to the Incident Console.
Response Attachments	Click this button to attach a file to the response sent to the end-user. The file will be sent with the response one time only; the file is not permanently attached to the incident. Refer to “Attaching Files to Incidents” on page 4-31.
Time Billed	Click this button to add billable time to an incident. **Note: By default, the Time Billed feature is disabled. Your RightNow administrator must enable this feature for the Time Billed button to appear. For more information, refer to “Tracking Time Spent on Incidents” on page 4-37.**
Spell Check	Click this button to check the spelling of any text you entered in the response, note, or any custom field. For more information, refer to “Spell Checking Text” on page 4-40.

Proposing Answers

New

One of the most powerful features of RightNow is the ease with which you can add answers to the knowledge base while you provide support to your end-users. The Propose Answer feature allows you to propose answers from incidents. While your RightNow administrator may have specific guidelines for you to follow, the procedure is simple. Proposing an answer consists of the following steps:

1. You solve an incident and respond to the end-user.
2. You select Propose from the Select Action drop-down menu on the Incident Console (or click Propose Answer on the Incident Details page).
3. The incident becomes a proposed answer visible on the Answer Console.
4. Your knowledge base engineer determines its access level, answer status, language, and visibility, and publishes it accordingly.

Note: When you propose an incident, the incident's threaded discussion is added to the answer description.

In previous versions of RightNow, staff members had to delete any notes in an incident before publishing it for public view. In eService Center 5.0, note threads eliminate the need to delete valuable communication in an incident to prevent it from appearing in the answer. This makes your job easier and provides a permanent record of each incident.

Note: If a staff member has a limited access profile, propose privileges will not be available.

To propose an answer:

1. Select Propose from the Select Action drop-down menu next to the appropriate incident on the Incident Console.

   Note: The incident is automatically added to the Answer Console as a proposed answer. Your knowledge base engineer will then review the answer to determine the appropriate access level and visibility.

2. Make a note in the incident (note thread) that you proposed an answer from this incident.

After you propose an incident, you will return to the Incident Console. A message at the top of the page notifies you that an answer has been created and shows the new answer ID.

Path: **>** Select Action ***>Propose***

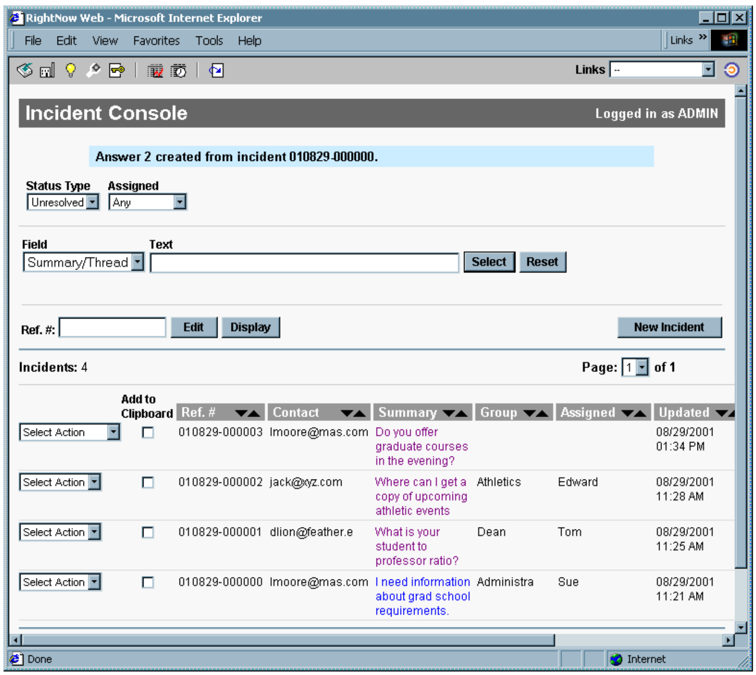


Figure 4-29: Message after Proposing Answer

Adding Incidents to the Clipboard

The Clipboard feature allows you to respond to, forward, or delete more than one incident at the same time rather than performing the action on each incident individually. The Clipboard feature saves you time when you have several incidents that pertain to the same issue, product, or question.

For example, suppose that your organization has recently released a new product and you have received a large number of emails about the new product. Using the Clipboard feature, you can write one response and then respond to all of the incidents in one action. In the same way, if you have a number of incidents that you no longer want in your database (for example, if you discontinue a product and are not going to support that product any longer), you can quickly delete those incidents using the Clipboard feature.

Note: Any incidents deleted through the Clipboard feature are permanently removed from your RightNow knowledge base; therefore, we recommend that you make a backup of your knowledge base before making any modifications.

To respond to a group of incidents:

1. On the Incident Console, choose the desired criteria using the drop-down menus and Text search box to display the group of incidents that you want to respond to (refer to “Searching for Specific Incidents” on page 4-9).
2. Select the Add to Clipboard check box next to each incident.

   Or

   Click **All to Clipboard** to add *all* incidents to the Clipboard.
3. Click **Clipboard** to add the incidents to the Clipboard and open the Incident Clipboard page.

   Note: Incidents are *not* placed on the Clipboard until you click **Clipboard**. If the incidents you want to respond to are on several pages of the Incident Console, you must click **Clipboard** to add the current page of incidents to the Clipboard before moving to the next page.

Path: > **Clipboard**

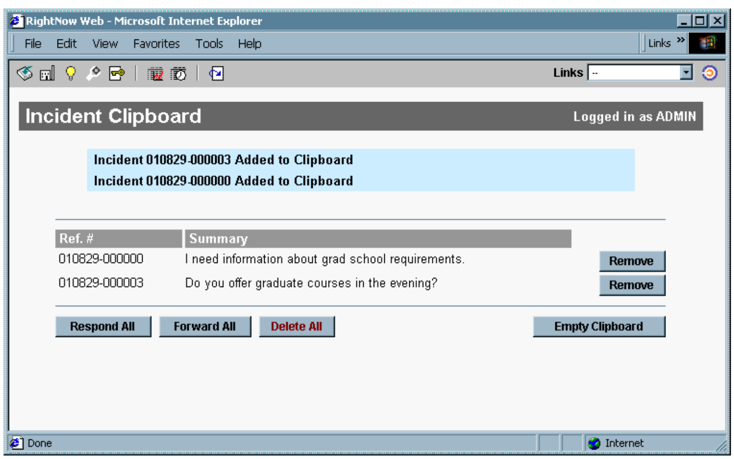


Figure 4-30: Incident Clipboard Page

Note: Refer to Table 4-7, “Incident Clipboard Page Functions Descriptions,” on page 4-60 for descriptions of the functions available on the Incident Clipboard page.

4. Click **Respond All** to write one response for all of the incidents. You will open the Update Clipboard Incidents page.

Path: > **Clipboard** > **Respond All**

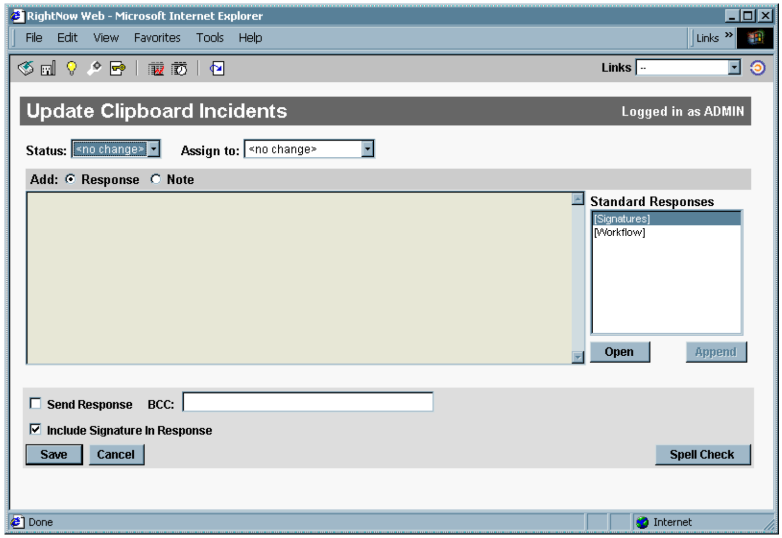


Figure 4-31: Update Clipboard Incidents Page—Respond All

5. To change the status of the incidents or to assign the incidents to another staff member, select the status and staff member from the drop-down menus.

6. Type the response in the Add text box.

7. To add a note, click the Note radio button and type the note.

8. Select ☐ **Send Response** to send the response.

9. Click **Save** to update the incidents, send the response, and set the status and assigned to value for each incident in the Clipboard. All of the incidents will be removed from the Clipboard and the Incident Console will open.

For descriptions of the additional fields and buttons on the Update Clipboard Incidents page, refer to Table 4-3, “Editing Incident Page Field Descriptions,” on page 4-21.

To forward a group of incidents:

New

1. Perform steps 1-3 in “To respond to a group of incidents:” on page 4-57.
2. Click **Forward All** to open the Forward All page.

Path: > **Clipboard** > **Forward All**

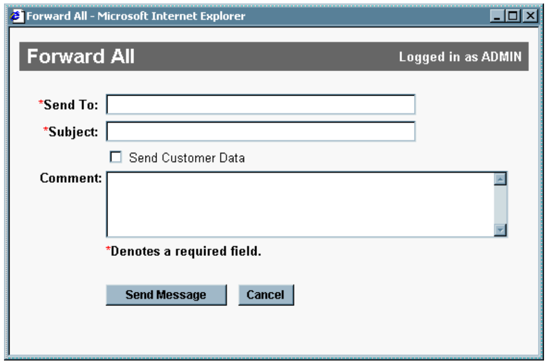


Figure 4-32: Forward All Page

3. In the Send To field, type the email address you want to forward the incidents to.
4. Type a subject in the Subject field.
5. To send customer information along with the incidents, select the Send Customer Data check box.
6. To add a comment about the incidents, type the comment in the Comment field.
7. Click **Send Message** to forward the incidents. All of the incidents will be removed from the Clipboard and the Incident Console will open.

To delete a group of incidents:

Note: Any incidents deleted through the Clipboard feature are permanently removed from your RightNow knowledge base; therefore, we recommend that you make a backup of your knowledge base before making any modifications.

1. Perform steps 1-3 in “To respond to a group of incidents:” on page 4-57.
2. Click **Delete All** to permanently remove all the incidents in the Clipboard from the knowledge base (see Figure 4-30, “Incident Clipboard Page,” on page 4-57).

Table 4-7 contains descriptions of the functions on the Incident Clipboard page.

Table 4-7: Incident Clipboard Page Functions Descriptions

Function	Description
Remove	Click this button next to an incident to remove the incident from the Clipboard. This does *not* delete the incident or change it in any way.
Respond All	Click this button to open the Update Clipboard Incidents page where you can respond to all of the incidents at once (see “To respond to a group of incidents:” on page 4-57).
Forward All	Click this button to open the Forward All page where you can forward the incidents to an email address (see “To forward a group of incidents:” on page 4-59).
Delete All	Click this button to permanently delete all of the incidents on the Clipboard. You will receive a message confirming your delete request before the incidents are permanently deleted. See “To delete a group of incidents:” on page 4-59.
Empty Clipboard	Click this button to remove all of the incidents from the Clipboard. This does *not* delete the incidents or change them in any way; it simply empties the Clipboard.

Advanced Editing Features for Incidents

As you edit and add incidents on the Incident Console, you can incorporate HTML code to create dynamic, well-formatted incident responses. Using HTML, you can include special formatting in your text and add graphics, hyperlinks, email links, and ftp downloads. In eService Center 5.0, the HTML will appear as code when viewing on the Incident Console; however, you can preview HTML output in a Web browser.

Because response time is often an issue when servicing your end-users' questions, extensive use of HTML code is often not necessary when responding to incidents. However, if your incidents will eventually be converted to answers and made available to end-users, you may want to take advantage of further design and formatting features. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Note: Be cautious when sending responses with HTML code unless you are sure your end-users have HTML-enabled email clients. For end-users who do not have HTML-enabled email programs, the HTML code will not be rendered, and the tags will be visible in the messages they receive.

This chapter contains the following procedures for incorporating HTML into your incident responses:

- Adding HTML code in incident responses (“Incorporating HTML Code in Incidents” on page 5-3)
- Adding graphics (“Adding Graphics to an Incident” on page 5-8)
- Adding hyperlinks (“Adding Hyperlinks to an Incident” on page 5-9)
- Adding email links (“Adding Email Links to an Incident” on page 5-9)
- Adding ftp downloads (“Adding an FTP Link to an Incident” on page 5-10)

Key Terms

As you incorporate HTML code in incidents, you will want to become familiar with the key terms associated with the features available in eService Center 5.0:

<as-html> tag—A tag that signals RightNow Web eService Center 5.0 to interpret any HTML in an incident response as actual HTML code.

email link—A link that automatically opens the end-user's email program and populates the "To" field with the address you specify. The end-user activates the link by clicking on the email link, which is usually underlined and set in a different color.

hyperlink—A connection between an element in an incident, such as a word, phrase, symbol, or image, and a different element in a document, chart, images table, or Web site. The end-user activates the link by clicking on the linked element, which is usually underlined and set in a different color.

PC_ESCAPE TAG—A configuration setting where you can enter HTML tags. By adding HTML tags in this configuration setting, you eliminate the need to precede HTML code with the <as-html> tag.

Incorporating HTML Code in Incidents

RightNow contains two features that allow you to use HTML to add design features to your incidents such as tables, bullets, columns, links, and special text formatting. In order for HTML tags to be rendered (turned into HTML format), you must use one of the following tags:

- <as-html> and </as-html> tags (refer to “Using the <AS-HTML> Tag” on page 5-3)
- PC_ESCAPE_TAGS configuration setting (refer to “Using the PC_ESCAPE_TAGS Configuration Setting” on page 5-5)

If you do not use either of these tags, any text you type in the response, including HTML code, will be displayed to the end-user exactly as you type it. This allows you to include examples of computer code or commands in your incidents without the code being executed.

Note: To use HTML in an incident response, you must also enable HTML through your Email Messages settings. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

Using the <AS-HTML> Tag

The <as-html> tag signals RightNow to interpret any HTML in the response as actual HTML code. For example, if you want to create a table within an incident response, you would preface the HTML code with <as-html> and follow the HTML code with </as-html>.

To use the <as-html> tag in incidents:

1. Open the Editing Incident page for the incident you want to respond to using HTML code. (For instructions on editing an incident, refer to Chapter 4, “Incident Console.”)
2. Type `<as-html>` before the HTML code you want to be rendered.
3. Type your text, including the appropriate HTML code.
4. Type `</as-html>` following your HTML code.

Path: > Select Action >***Edit***

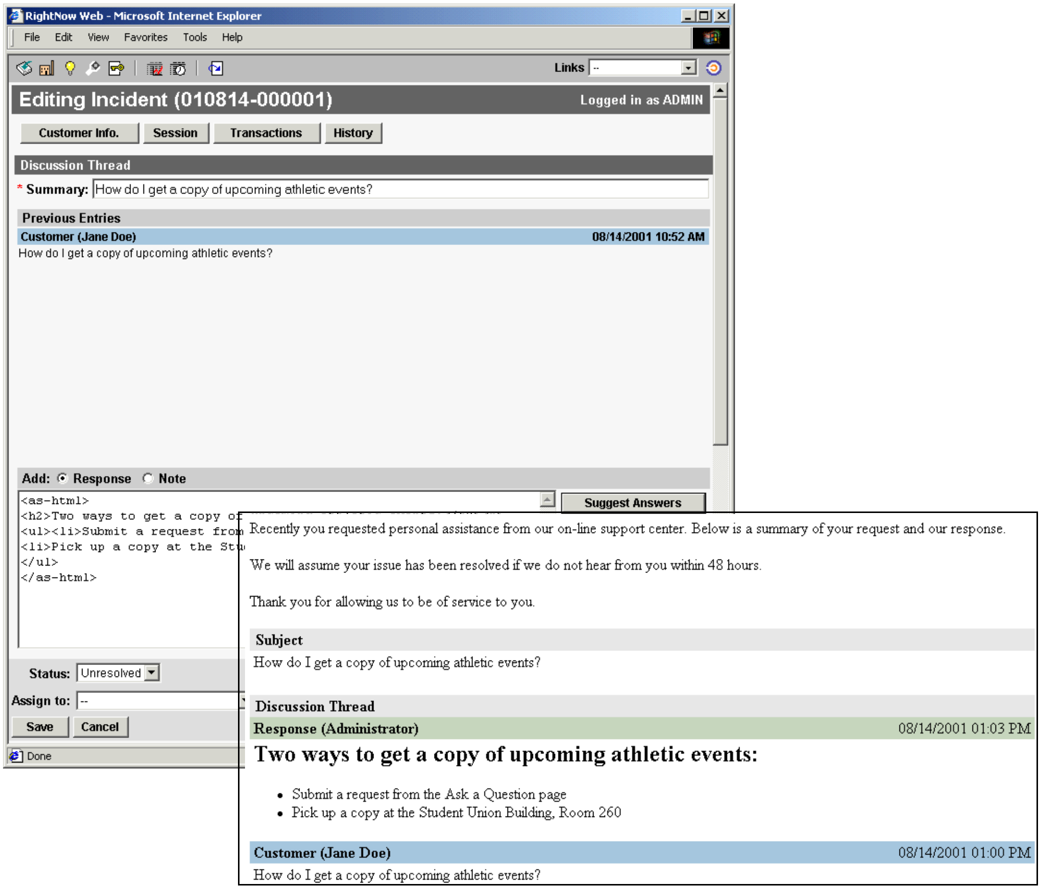


Figure 5-1: Adding an Incident Response with the <as-html> Tag

Figure 5-1 illustrates the proper syntax and order for the <as-html> tag when responding to an incident, and the email response for the incident as viewed by the end-user.

Note: Any text outside the <as-html> and </as-html> tags will be displayed exactly as you type it.

Using the PC_ESCAPE_TAGS Configuration Setting

The PC_ESCAPE_TAGS configuration setting (RNW User Interface>Misc. Customization>Page Content>PC_ESCAPE_TAGS) enables you to specify HTML tags that will be automatically rendered when you include them in an incident response. If you frequently use a specific HTML tag in your responses, you can include the tag in the PC_ESCAPE_TAGS configuration setting so that each time you use this tag in an incident, the HTML will be rendered. If a tag is included in the PC_ESCAPE_TAGS configuration setting, it will be interpreted as HTML code without having to add the <as-html> tag.

For example, if you enter **b** for the bold tag () in the PC_ESCAPE _TAGS setting, when you use the tag in an incident, the text within this tag will be displayed in bold. If you do not include **b** in the PC_ESCAPE_TAGS setting, the will not be rendered as HTML, but will be displayed as the text “” in the incident.

Note: By default, the hyperlink tag, <a>, and the image tag, <img>, are included in the PC_ESCAPE_TAGS setting.

For more information about configuration settings, refer to the *RightNow Web eService Center 5.0 Reference Manual*.

Commonly Used HTML Tags for Incidents

Some HTML tags can easily be incorporated into your incident responses without a lot of time or extensive knowledge of HTML code. This section briefly explains how to add a few common HTML tags to incidents. A working knowledge of HTML code, the syntax, and how to implement it is necessary for understanding this section. Keep in mind that HTML tags are *not* case sensitive.

Note: For your HTML code to be interpreted as HTML when it is displayed, you must use either the <as-html> tag or the PC_ESCAPE_TAGS configuration setting. For more information, refer to “Incorporating HTML Code in Incidents” on page 5-3.

Table 5-1: Commonly Used HTML for Incidents

Name of Tag	Format/ Attributes	Reason for Use
Paragraph tag	<p>	This tag specifies the beginning of a new paragraph
Break tag	 	This tag specifies the beginning of a new line
Bold tag	... 	This tag creates bold text.
Italic tag	<i>... </i>	This tag creates italic text.
Underline tag	<u>... </u>	This tag creates underlined text.
Font tag	...	This tag enables you to change text style, size, and color. Refer to “Font Tag Attributes” on page 5-7.
Ordered list tag	...	This tag creates a left-indented and sequentially numbered, ordered list. Use the tag to identify each list item.
Unordered list tag	...	This tag creates a left-indented, unordered list. Use the tag to identify each list item. List items are displayed with bullets.
Blockquote tag	<blockquote>... </blockquote>	This tag creates a block of text that is indented on both the left and right and double-spaced between previous and following paragraphs.
Heading tag	...	This tag creates headings of different sizes: <h1> is the largest heading size and <h6> is the smallest heading size.
Superscript tag	^{...}	This tag creates superscripts.
Subscript tag	_{...}	This tag creates subscripts.

Font Tag Attributes

The font tag <font> allows you to change the size or color of Web page fonts. <font> is a non-empty tag; all text (from a single character to thousands of words) between the opening and closing tags is affected.

- <font> has two associated tag attributes; both have multiple value ranges
- <font> requires at least one attribute

The value range of the size attribute is 1-7. These values can be specified as either *absolute* or *relative* values. To specify an absolute value, choose a number between 1 and 7 (<font size=4>). The relative value range is between -7 and +7, excluding 0 (<font size=+4>). Font attributes are outlined in Table 5-2.

Table 5-2: Font Tag <font> Attributes

<font> Attribute	Description	Values
size	Text size	1-7 (absolute values; no direct mapping to point or pixel sizes) +1-7/-1-7 (relative values; no direct mapping to point or pixel sizes)
color	Text color	One of 16 color names (black, green, silver, gray, white, maroon, red, purple, fuchsia, lime, olive, yellow, navy, blue, teal, aqua) RGB hexadecimal notation codes
face	Text font	Any TrueType font name. This attribute defines a comma-separated list of font names in order of preference: <font face="verdana,arial,impact">

Adding Graphics and Links to an Incident

When using HTML in your incidents, you can easily add graphics and links to your response through the <img> and <a> tags. As described earlier, these tags are specified in the PC_ESCAPE_TAGS configuration setting, so you are not required to use <as-html> unless other HTML elements are also being included.

You can incorporate graphics into an incident response, including pictures, charts, and graphs. These are added using the <img> tag. You may want to use images to create a more visually appealing response, or to show a picture or diagram as part of your response.

Note: The GIF and JPEG image formats are the most popular formats used for the Web and are supported by most Web browsers. In general, you want to use the image formats that are widely supported; otherwise, the images may not appear correctly when viewed by your end-users. Consult your Web browser manufacturer for information on which image formats are supported.

You can also include links, including hyperlinks to other Web sites, email links, or FTP links by using the <a> tag. Hyperlinks can link end-users to other locations on the Internet, such as charts, images, documents, tables, or Web sites. Email links create a link that will open an end-user's default email program with a new message that has the To field pre-populated with the address you specify. FTP links allow end-users to link to an FTP server to quickly download programs, files, or images directly from the link.

The following sections describe the format of adding graphics and links to an incident.

Adding Graphics to an Incident

You can add graphics to an incident by using the <img> tag in the response field. You can do this when responding to an incident to display graphics to the end-user when they receive your response by email.

To add a graphic, enter an <img> tag in the desired location into the Response field using the following syntax:

```
<img src="http://<servername>/<directory>/<filename>">
```

Note: The images and Web files will usually be located in the Web space on your server (that is, the space that the Web server uses). Consult your company's webmaster or RightNow administrator for specific locations of images and files.

Adding Hyperlinks to an Incident

Hyperlinks allow you to create dynamic incident responses that can link end-users to other locations on the Internet.

To add a hyperlink, enter a hyperlink tag in the desired location of the Responses field using the following syntax:

- To link to a file:

  ```
  <a href=”http://<servername>/<directory>/<filename>”>Text
  that you want user to see</a>
  ```

- To link to a Web page:

  ```
  <a href=”http://www.<your_domain>”>Text you want the user to
  see</a>
  ```

The text will appear highlighted in blue and underlined.

Note: If you type a URL in the incident response text without the <a> tag, many email programs and other applications will automatically detect the text “http://” and create an active hyperlink to that URL. We recommend, however, that you use the <a> tag to ensure that a hyperlink is created.

Adding Email Links to an Incident

You can add email links to incidents to enable end-users to quickly send email messages to a particular email address. For example, if end-users want to contact a particular staff member or group in your company, you can add an email link in the incident response that allows them to easily write an email message without having to open their email program and type the address.

To add an email link, enter the hyperlink tag with the email attribute in the desired location of the Responses field using the following syntax:

```
<a href=”mailto:mailbox@mailserver”>Text that you want user
to see</a>
```

The text will appear highlighted in blue and underlined.

Adding an FTP Link to an Incident

You can create a link to a file on an FTP server to allow end-users to quickly download programs, files, or images directly from the link in the incident rather using a URL to navigate to the file. When the end-user clicks the link, the Web browser’s FTP program automatically opens.

If you are linking to an anonymous FTP server (that is, an FTP server that does not require a user name and password), use the following syntax:

```
<a href=”ftp://servername/directory/filename”>Text that the user
will see</a>
```

If you are linking to an FTP server that requires a user name and password, use the following syntax:

```
<a href=”ftp://user:password@server/directory/filename”>Text that
the user will see</a>
```

Note: We recommend that you do not include both the user name and password, just the user name as in `ftp://user@server/directory/filename`. This will prompt end-users for their password.

Adding Links that Reference Existing Answers

You can create a link to an existing answer on the Answer page. This link, which can be placed in the Responses field of an incident, must reference the Answer Display page and pass the answer’s faqid as an argument.

To add a link to an existing answer, use the following syntax:

UNIX

```
<a href=”http://<your_domain>/cgi-bin/<your_interface>.cfg/
php/enduser/olh_adp.php?p_faqid=<answer ID”>Text that you
want user to see</a>
```

Windows NT/2000

```
<a href=‟http://<your_domain>/scripts/<your_interface>.cfg/
php.exe/enduser/olh_adp.php?p_faqid=<answer ID>”>Text that
you want user to see</a>
```

Where:

p_faqid—This value specifies the ID number of the answer to be displayed.

Caution! Creating a hyperlink using the full answer URL from the end-user pages with the user information and customer session parameters may result in site performance problems, including incorrect data for customer session and Related Answers.

The following example is an answer URL generated when viewing an answer from the end-user pages (UNIX platform). It is a lengthy URL that includes the session ID information. This URL format should not be used for creating a link to an answer.

http://<your_domain>/cgi-bin/<your_interface>.cfg/php/enduser/
std_adp.php?p_sid=s8CA1sTf&p_lva=1&p_faqid=5&p_created=996526232&p_sp=cF9ncml
kc29ydD0mcF9yb3dfY250PTMmcF9wYWdlPTE*&p_li=

RightNow Live

While self-service and email management can solve the majority of end-user issues, Live assistance remains the best venue for certain queries. As a RightNow Live agent (staff members with Live privileges designated in their security profile), you can serve end-users in real time, interacting one-on-one online or over the phone. You can automatically escalate urgent matters or communications from premium end-users and help end-users complete their purchases.

Two-way chat (via pop-up Web browser windows) allows you and end-users to converse through typed conversation; this give and take helps you resolve matters quickly and efficiently. Web pages and additional information—product information, installation instructions, diagrams—can be “pushed” to the end-user’s screen, providing a visual, multimedia response. At any time during chat, end-users can request a telephone callback or, if they prefer, request a callback when submitting their initial request for Live assistance.

Enhancements in eService Center 5.0 provide additional capabilities for agents and end-users:

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- Agents can initiate a collaboration session to guide end-users through Web pages using co-browse.
- Agents can view the end-user’s SmartSense rating during a chat.
- Supervising agents can monitor other agents’ chat sessions to assist in solving problems.
- Agents can access SmartAssistant suggested solutions during a chat.
- End-users can search the knowledge base while in the wait queue to find answers to their questions.
- Agents can access a list of the pages in RightNow Web eService Center 5.0 that the end-user viewed before requesting a chat.
- Agents can transfer an end-user to another agent or conference another agent into a chat.

Note: The co-browse option will be available only if your organization has purchased RightNow Live collaboration. If your organization has purchased this option, your RightNow administrator must enable COLLABORATION_ENABLED for you to co-browse with end-users during chat.

This chapter takes you through a Live chat from logging in to co-browsing with an end-user. Also included is a description of the Agent Control and Live Chat windows, the main windows for managing your chat sessions, interacting with end-users, and accessing chat management tools. Certain end-user actions are also included to show you the chat session sequence and the results of specific actions.

Key Terms

As a RightNow Live agent, you will want to become familiar with the key terms associated with RightNow Live as you engage in chat with end-users.

Agent Control window—The window where agents manage their chat sessions, view the chat status of other Live agents, and view a list of end-users in the queue. For agents with monitor privileges, they can monitor other agents' chat sessions from the Agent Control window.

Co-browse—A function in RightNow Live that enables an agent to initiate a collaboration session to guide an end-user through Web pages using the mouse pointer to demonstrate actions.

Conference—A RightNow Live function that enables an agent to conference another agent into the current chat session.

Form assistance—A subset of RightNow Live collaboration (co-browse) that allows end-users to request a Live chat from a page outside of RightNow Web eService Center 5.0 and push a partially completed form to the agent's computer for assistance.

Live Chat window—The window where agents engage in chat sessions with end-users and access chat tools for answering questions and solving problems during Live chat.

Monitor privileges—A security profile privilege that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.

Transfer—A RightNow Live function that enables an agent to transfer an end-user to another agent during a chat session.

Getting Started

Once your administrator has configured your profile to include phone, chat, and possibly monitor privileges, you can log in as a RightNow Live agent. You may have privileges for all three Live options, or a combination of the three.

Note: The agent applet is now based on Java 2 and Swing (Java Development Kit 1.3 and Swing 1.1.1). You must install the latest Java plug-in from Sun. If you attempt to log in without the plug-in, you will be prompted to download the Java 1.3 plug-in from Sun's Web site.

Contact your RightNow administrator or refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information about the Java plug-in and other system requirements necessary to run RightNow Live.

To log in as a RightNow Live agent:

From any administration page, click  on the icon toolbar to open the Agent Control window.

Note: If RightNow Live has not been enabled, the  icon will not appear on any administration page. For information on enabling Live, ask your RightNow administrator or refer to the *RightNow Web eService Center 5.0 Administration Manual.*

Path: 

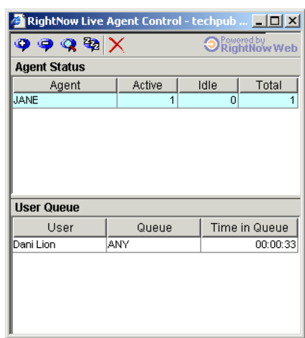

Figure 6-1: Agent Control Window

The next section describes your options from the Agent Control window.

Agent Control Window

The Agent Control window lists all agents available for chat sessions. From this window you can manage your chat sessions as well as view the status of other agents, including other agents' available sessions. You can also view the status of end-users in the queue, including queue position and wait time. By viewing wait time in the queue, you can quickly add another chat session so that end-users are not waiting a long time without any contact.

Table 6-1 describes the buttons and fields on the Agent Control window.

Table 6-1: Agent Control Window Field Descriptions

Field/Button	Description
	Click this button to increase the number of chats you can engage in.
	Click this button to decrease the number of chats you can engage in.
	Click this button to select a chat session to monitor. Once you click this button, a list of available sessions is displayed. **Note: You must have monitor privileges assigned in your security profile to access this function. If not, this button will be grayed. Refer to "Monitoring a Chat" on page 6-6 for detailed information and procedures.**
	Click this button to stop receiving chat requests.
	Click this button to log off and close the Agent Control window.
Agent Status	
Agent	This field lists the staff members logged in as RightNow Live agents.
Active	This field lists the number of chat sessions the agent is currently engaged in.
Idle	This field shows the number of chats the agent is available for (potential chats).
Total	This field lists the agent's total active plus idle chat sessions.
User Queue	
User	This field lists the first names of all end-users in the queue.
Queue	This field displays the position of end-users in the wait queue.
Time in Queue	This field displays the length of time each end-user has been in the wait queue.

Managing your Chat Sessions

Each agent can handle a configurable number of concurrent chat sessions to maximize productivity. Once you log in, you are automatically available for one Live chat session. You can then add additional chat sessions depending on your workload and the number of end-users in the wait queue.

To manage your chat sessions:

1. To add another session, click . This will allow you to have more than one chat session at the same time. Each time you click this button, your available chat sessions increase by one.
2. To decrease the number of sessions you are available for, click . Each time you click this button, your available chat sessions decrease by one.
3. To make yourself unavailable for future calls/chat sessions, click . This will not affect your active sessions (that is, those sessions in which you are connected to an end-user).
4. To log off as a Live agent, click .

Monitoring a Chat

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If your profile includes monitor privileges, you can view other agents' active chat sessions and their SmartSense rating. Viewing an agent's SmartSense rating can help you gauge the tone of the chat session before viewing the actual dialog between the agent and the end-user. Agents will not be aware that their Live chats are being monitored unless you choose to assist them in some way. This can include finding suggested solutions for the chat session based on the chat dialog and sending messages to the agent being monitored.

To monitor a Live chat:

1. From the Agent Control window, click to display a list of agents currently engaged in chat.

Path: >

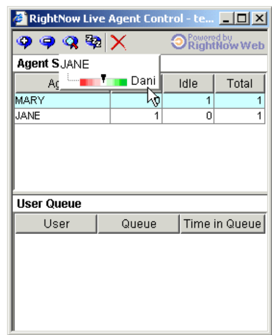

Figure 6-2: Monitoring SmartSense Rating

2. Click an agent's name to see the agent's SmartSense rating.
3. Double-click an agent's name to open the Monitored Chat window that displays the agent's active session with the end-user.

Path:  **>**  ***>Agent Name***

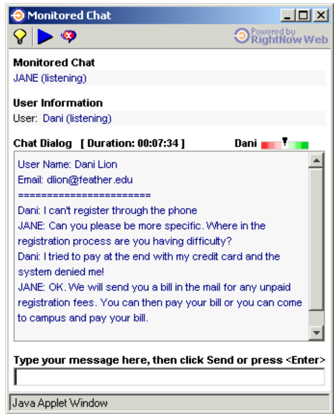

Figure 6-3: Monitored Chat Window

Notice that the SmartSense rating for the end-user appears on the Monitored Chat window. In this version of RightNow, the SmartSense rating is represented by a colored meter. You can also see the dialog between the agent and the end-user and take any appropriate action, including displaying SmartAssistant suggested solutions to help the agent solve the end-user's problem and sending messages to the agent being monitored.

Table 6-2 describes the functions available to an agent who is monitoring a chat session.

Table 6-2: Monitored Chat Window Field Descriptions

Button	Description
	Click this button to display suggested solutions based on the chat session dialog. Refer to "Accessing SmartAssistant Suggested Solutions" on page 6-20 for more information.
	Click this button to send text to the agent being monitored.
	Click this button to close the Monitored Chat window.

The following section shows you the sequence of events starting when an end-user requests a chat from the Live Assistance page. Included are those instances when agents are unavailable, when end-users request assistance after hours, and when the wait queue has been enabled. Immediately following this information are the procedures necessary to establish and maintain a two-way dialog between you and an end-user and the tools available to you in solving end-users' problems during Live chat.

Live Assistance Page

When end-users request a chat session (by clicking **Live Assistance** on the Support Home page or the Live Help tab on another end-user page), the Live Assistance page opens; end-users then fill in the required information to submit a chat or phone request and click **Submit Request**.

When end-users enter their email address on the Live Assistance page, RightNow checks to see if a customer record exists in the database. For end-users who have a customer account, their customer record will be updated. If there is no customer record, a customer account will be created. (Refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information.)

Path: Support Home>Live Assistance

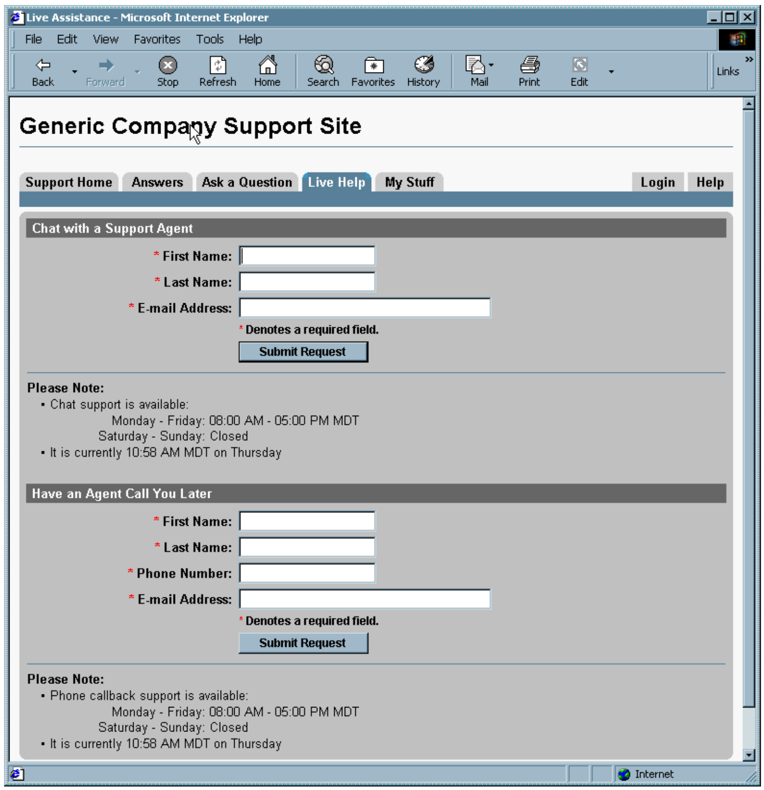

Figure 6-4: Live Assistance Page

Note: Fields that appear on the Live Assistance page can be configured by your administrator. Incident custom and customer custom fields can appear in the chat section, phone section, or both. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for more information about custom fields and their visibility.

RightNow Live can be configured to display a variety of messages when end-users cannot be routed to an agent. The message end-users receive depends on how your RightNow administrator has configured your site. End-users will not immediately be routed to an agent when any of the following occur:

- Agents are logged in, but there are more end-users requesting a chat than available agents.
- No staff members are current logged in as agents.
- End-users request a Live chat after business hours.

Requesting Live Assistance with Wait Queue Enabled

When all agents are busy and the wait queue feature has been enabled, end-users will be placed in a wait queue. The wait queue feature notifies end-users of their position in the queue (for information on how to enable this feature, refer to the *RightNow Web eService Center 5.0 Administration Manual*). As agents become available, the end-user's position in the wait queue is updated accordingly.

While waiting for an agent, end-users can search the database for answers, which encourages end-users to find their own answers. If a search is successful, end-users are presented with suggested solutions in a separate Web browser window. If any of the solutions answer the question, end-users can exit the queue without waiting for an agent.

New

Figure 6-5: Searching in the Wait Queue

Requesting Live Assistance when Agents are Unavailable

When Live agents are not available to accept a chat session and the wait queue feature is *not* enabled (refer to Figure 6-5, “Searching in the Wait Queue,” on page 6-9), end-users will receive the following message:

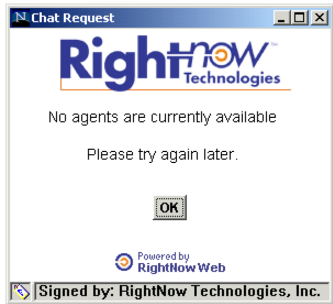

Figure 6-6: No Agents are Available

Note: This window will display to end-users only when there is no entry in the following configuration setting:

RightNow Live>General>Agent>AGENT_UNAVAILABLE_URL

If your RightNow administrator has configured your system to route end-users to the Ask a Question page or another Web page when agents are unavailable, end-users will see the following message.

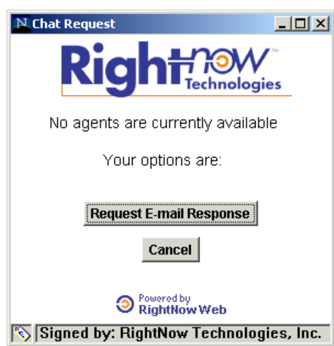

Figure 6-7: Request Email Response

When end-users click **Request E-mail Response**, they are re-routed to the configured RightNow page (the Ask a Question or Find Answers pages) or any other URL.

Requesting Live Assistance after Business Hours

When end-users click **Live Assistance** (or the Live Help tab) after business hours and your site has been configured to display chat time information, the following page opens:

Path: Support Home>Live Assistance

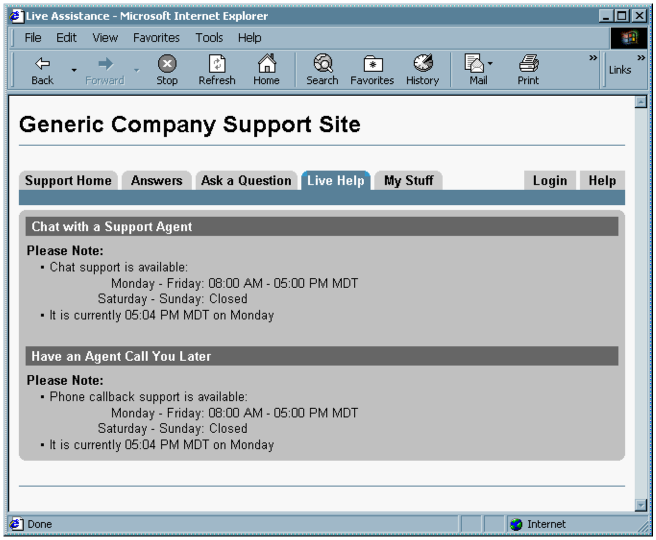

Figure 6-8: Requesting Live Assistance after Business Hours

Note: Hours when end-users can request Live chat are set by your RightNow administrator.

Chatting with an End-User

Once you are logged in to RightNow Live and have made yourself available for a chat (Idle column displays a number greater than 0), you are ready to accept chat requests. Incoming Live chat requests are automatically routed to the next available agent. The agent selected for the incoming call will be the available agent idle the longest.

To chat with an end-user:

If you are the agent selected for the chat request, your Agent Control window switches to the Chat Request window and, if enabled, an audible tone alerts you to the incoming request.

Figure 6-9: Chat Request Window

Note: The icon on the top left of the Chat Request window blinks to indicate that an action on your part is required.

1. Click Accept to open the Live Chat window.

Note: If you click Decline, the chat request will automatically be routed to the next available agent.

Path: Chat Request> Accept

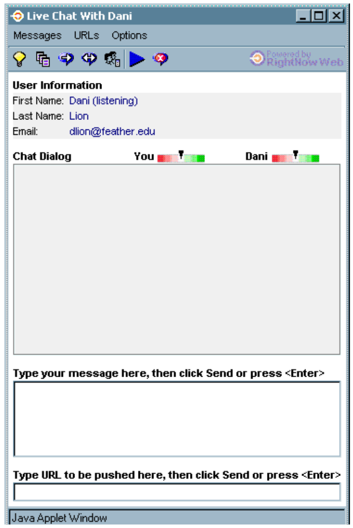

Figure 6-10: Agent's Live Chat Window

Live Chat Window

The Live Chat window is the window where you chat with end-users and access the chat management tools for answering questions and solving problems. Links at the top of the window (Messages, URLs, and Options) allow you to select standard responses and URLs to push to the end-user's Web browser, and set default options while logged in as an agent. Below the links are the icons for accessing the chat management tools for solving end-users' issues.

From the Live Chat window you can do any of the following:

- Select a default key or key sequence to send messages to end-users
- Enable or disable the incoming alert tone
- Access SmartAssistant suggested solutions based on the session dialog (text)
- View a list of the pages in RightNow Web eService Center 5.0 that the end-user accessed before requesting a Live chat
- Transfer an end-user to another agent
- Conference another agent into a chat
- Initiate a co-browsing session with the end-user
- Select a standard response to send to the end-user
- Select a standard URL to push to the end-user's computer screen

Table 6-3 describes the links and buttons available to agents on the Live Chat window.

Table 6-3: Agent's Live Chat Window Field Descriptions

Field/Button	Description
Messages	Click this link to access a list of predefined responses to send to the end-user.
URLs	Click this link to access a list of predefined URLs to push to the end-user.
Options	Click this link to select defaults in this session for sending text and enabling / disabling the incoming alert tone.
	Click this button to display suggested solutions based on the chat session text. See "Accessing SmartAssistant Suggested Solutions" on page 6-20.
	Click this button to view the pages the end-user viewed in RightNow before requesting a Live chat. See "Viewing Customer Session Information" on page 6-21.
	Click this button to transfer the end-user to another agent. See "Transferring an End-User to Another Agent" on page 6-22.
	Click this button to conference another agent into your chat. See "Conferencing Another Agent into Your Chat" on page 6-24.
	Click this button to co-browse with the end-user. See "Co-browsing with an End-User" on page 6-26.
	Click this button to send your response to the end-user.
	Click this button to disconnect from the chat session.

Configuring Options on the Live Chat Window

You can customize certain options as you chat with end-users to help you provide the quickest and most effective assistance possible. You can choose a default for the key you press to send message text or a URL to end-users and enable or disable the audible tone that alerts you to an incoming request.

Path: Live Chat>Options

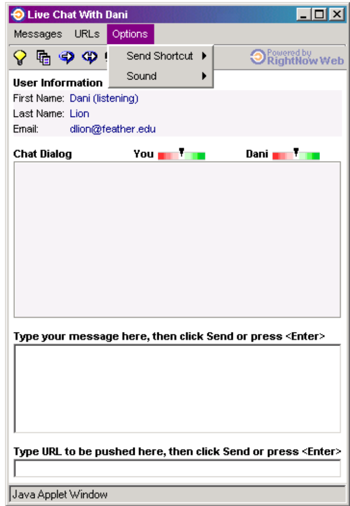

Figure 6-11: Agent Live Chat Window—Options Link

Select a Send Shortcut

Any text you type in the Live Chat message text box is not sent to the end-user's chat window until you click , or press **Enter** or **Ctrl+S** (the default is **Enter**).

You can select the send shortcut option (which key is pressed to send the text) from the Options link. When you select a shortcut, it will affect all of your chat sessions until you log off.

Note: Your RightNow administrator can permanently set **Enter** as the key to send text with the following configuration setting:

RightNow Live>User Interface>Shortcuts>SHTC_ENTER_TO_SEND

To select a send shortcut:

1. Click Options and select Send Shortcut.

Path: Live Chat>Options>Send Shortcut

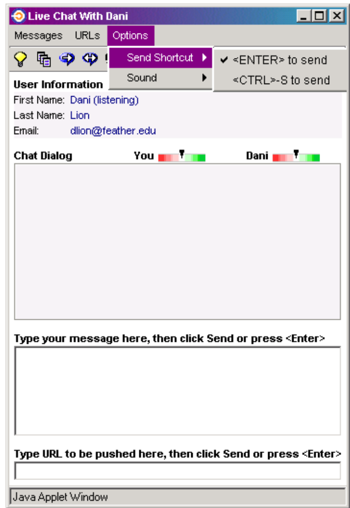

Figure 6-12: Setting a Send Shortcut

2. Select **Enter** or **Ctrl+S**.

Note: Your selection will remain in effect until you log off.

Configure the Sound Option

You can also enable the sound on your Live Chat window to alert you to incoming requests. Any change you make to this option stays in effect until you log off and affects all of your chat sessions.

To configure the sound option:

1. Click Options and select Sound.

Path: Live Chat>Options>Sound

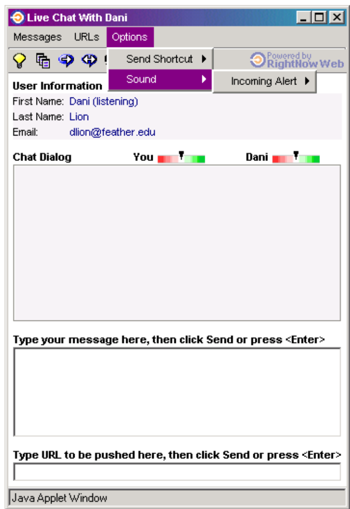

Figure 6-13: Enabling the Incoming Alert Tone

2. Click Incoming Alert, and then select Enabled or Disabled.

The following pages contain the sequence of events between the agent and the end-user engaged in a chat. Following these basic steps are the additional options available to you for solving end-user problems and answering questions.

When you accept an incoming chat request, the end-user's Live Assistance window opens with a customized greeting from the Live server (as customized by your RightNow administrator—refer to the *RightNow Web eService Center 5.0 Administration Manual* for details on how to change this greeting).

Path: Chat Request> Accept

Figure 6-14: Live Assistance Window for End-Users

3. The end-user types a message or question in the message text box and clicks Send, or presses **Ctrl+S** or **Enter** (the default to send the text).

Path: Chat Dialog> Send

Figure 6-15: Agent's Live Chat Window when End-User Sends Message

If enabled, an audible tone alerts you that the end-user has sent a message, and the icon on the top left of the page blinks. The end-user's dialog displays in your Chat Dialog box.

The SmartSense emotive rating has been added to the Live Chat window to provide you with immediate feedback on the general emotional state of the end-user. The SmartSense meter is also updated throughout the chat session so that your conversation and the end-user's are rated (the rating is weighted toward the last dialog, whether agent or end-user). Figure 6-15 shows the SmartSense rating for both the agent and the end-user. For more information about the SmartSense feature, refer to "SmartSense Emotive Rating" on page 4-17. New

4. Type a reply in the message text box. You can cut, paste, highlight, and delete text in the message text box. You can also quickly jump to the buttons on the top of the window by pressing **Ctrl+Tab**.

5. Click , or press **Ctrl+S** or **Enter** (the default) on the keyboard to send your response. (Refer to "Select a Send Shortcut" on page 6-15 for instructions on setting a default send shortcut.)

Note: If you type a message in the message text box and a URL in the URL text box, the message will be sent before the URL is pushed. (For more information on pushing URLs, refer to "Pushing Standard URLs" on page 6-32.)

Tools for Answering End-Users' Questions

The previous instructions illustrate the basic steps between you and the end-user during a Live chat; however, RightNow has a variety of tools to help you answer end-users' questions and solve problems. This section contains a description of these tools and the procedures for using them.

Note: All of the options are accessed from the Live Chat window.

Accessing SmartAssistant Suggested Solutions

New

While chatting with an end-user, you can ask SmartAssistant to suggest solutions for an end-user's question. SmartAssistant searches the knowledge base and returns possible solutions related to the chat history text (a new Web browser window opens containing links to the suggested solutions). If any solution is pertinent, you can cut and paste the link to the solution or the actual text from the solution into the text box on your Live Chat window and send it to the end-user.

To access SmartAssistant suggested solutions:

1. On the Live Chat window, click . The Preliminary Response to Question page opens.

Path: Live Chat>

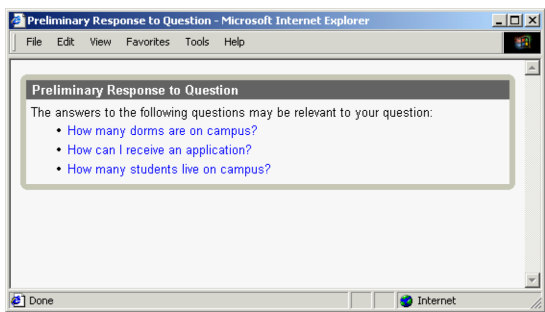

Figure 6-16: Agent Suggested Solutions

Note: End-users will not see the list of suggested solutions.

2. Double-click an answer to view the complete question and answer.
3. Copy the text of the answer or the answer link to insert in your message text box.
4. Modify as necessary before sending to the end-user.

Viewing Customer Session Information

New

You can tailor your assistance to end-users by knowing what actions they performed before submitting their chat request. Using session tracking information, you can view all the pages visited within the support site and search histories (text searches, general searches, and answers viewed). You will be better prepared if you know how much time end-users have spent looking for answers.

For example, for end-users who immediately request a Live chat before searching the knowledge base, you can route them back to the Find Answers page. This encourages end-users to find their own answers. On the other hand, end-users who spend time searching on their own before requesting a Live chat may be somewhat frustrated, and you can tailor your assistance accordingly.

To view customer session information:

1. On the Live Chat window, click . The Customer Session page opens.

Path: Live Chat>

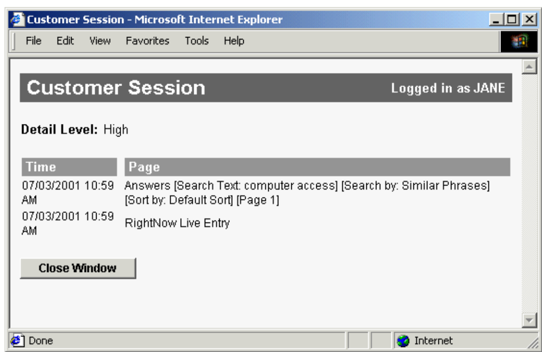

Figure 6-17: Customer Session Page

2. Click **Close Window** to return to the Live Chat window.

Note: The level of detail that is displayed for the Customer Session page can be configured by your RightNow administrator. For more information about how you can use customer session information, refer to "Viewing a Customer Session" on page 4-43.

Transferring an End-User to Another Agent

New

When necessary, you can transfer an end-user to another agent while you are engaged in a chat session. This feature is helpful when another agent has more experience with a specific topic.

To transfer an end-user to another agent:

1. Click to view a list of available agents.

Path: Live Chat>

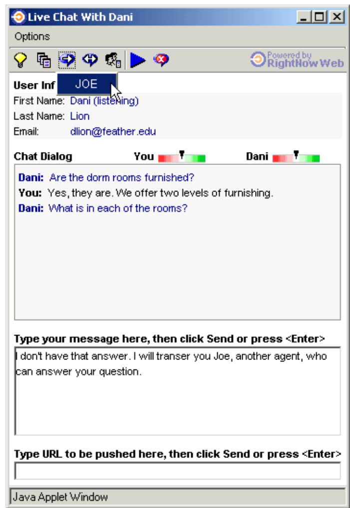

Figure 6-18: Transferring to another Agent

2. Click the agent's name to open an internal chat window.

Path: Live Chat>  ***>Agent Name***

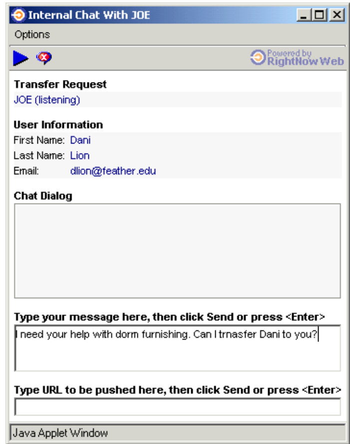

Figure 6-19: Internal Chat

The internal chat enables you to communicate with the other agent and prepare before the transfer is made.

Path: Live Chat>  ***>Agent Name>Internal Chat***

Figure 6-20: Internal Chat with Accept and Decline Options

3. The selected agent clicks  to accept the transfer, or  to decline.

Once the transfer is made, the end-user receives a message about the transfer and your internal chat window closes; however, the chat session is still available to you for documentation purposes.

Conferencing Another Agent into Your Chat

New

Also new in eService Center 5.0 is agent conferencing. This feature can be useful when you want to include another agent in your chat session to help you solve the end-user's problem.

To conference another agent into your chat:

1. Click to display a list of available agents.

Path: Live Chat>

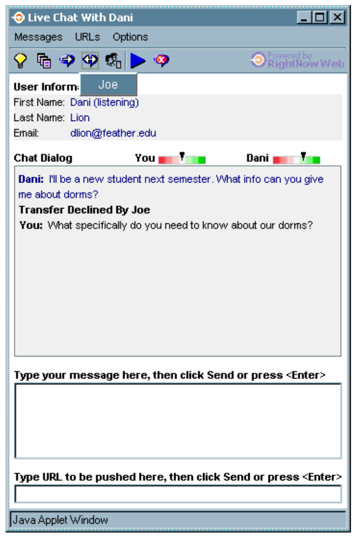

Figure 6-21: Conferencing another Agent into your Chat

2. Click the agent's name to open an internal chat window.

Path: Live Chat> >Agent's Name

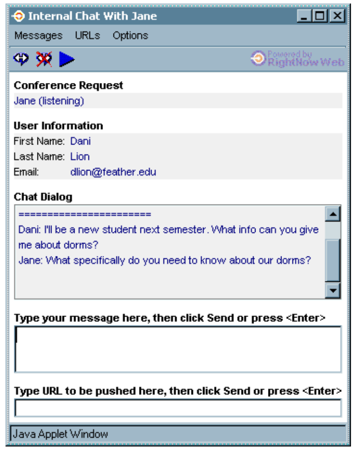

Figure 6-22: Internal Chat before a Conference

The internal chat enables you and the other agent to discuss the situation before the conference is started.

3. The agent clicks to conference into the chat, or to decline.

Once the conference has started, each person can send text and all those in the conference see the message text and the name of the person who sent it.

Co-browsing with an End-User

New

RightNow's co-browse function (RightNow Live collaboration) allows you to guide an end-user through a Web page using your mouse pointer to demonstrate actions. In effect, you take control of the end-user's computer to "show" rather than "tell." Co-browsing will help eliminate the confusion that can arise when giving instructions to end-users and is also effective for assisting end-users in filling out forms or completing a sale.

Note: As a security measure, agents and end-users can co-browse only those sites within their respective domains.

To co-browse with an end-user:

1. In the URL text box, enter the URL you want to co-browse.

Note: A configuration setting controls the default URL that is pushed to the end-user when you do not specify a URL before initiating co-browse. In addition, URLs can be added to the URLs menu on the Live Chat window, providing a fast way to send URLs to end-users to start co-browsing. See "Pushing Standard URLs" on page 6-32. For information about defining URLs to use during chat, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

2. Click to initiate co-browse.

Once you initiate co-browse, the Web site specified in the URL text box (or the default) will open on your computer and the end-user's.

Path: Live Chat>

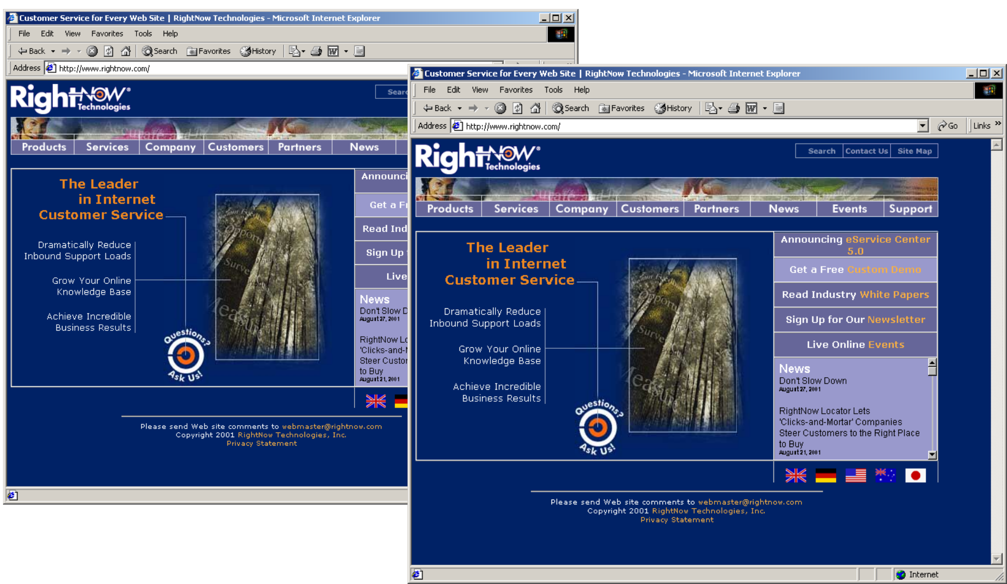

Figure 6-23: Co-browse Initiated on End-User's and Agent's Computers

A co-browse pointer appears on your Web page and the end-user's. (The pointer is the RightNow Live icon that flashes to signal an incoming request.) As you move your mouse, the pointer on the end-user's screen mimics what you do on your screen; for example, you can select and show objects on the end-users's Web page. Any text you enter will be displayed on the end-user's Web browser window.

Note: Once you initiate co-browse, a co-browse control button appears to the right of the co-browse button on your Live Chat window. This button contains the letters "A" and "U," allowing you to toggle control of the co-browsed site between you and the end-user. The co-browse control button prevents Web browser crashes that can occur when both agent and end-user are trying to control the co-browsed site at the same time.

Path: Live Chat>

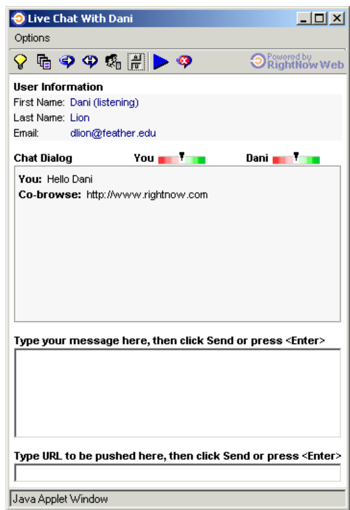

Figure 6-24: Live Chat Window with Co-browse Control Button

3. To take control of the co-browsed site, click the top of the co-browse control button ("A").
4. To allow the end-user to control the co-browsed site, click the bottom of the co-browse control button ("U"). Any mouse movement by the end-user will move the pointer on your screen.
5. To end the co-browse session, close the Web site. You will return to the Live Chat window.

Path: Live Chat>  ***>Close***

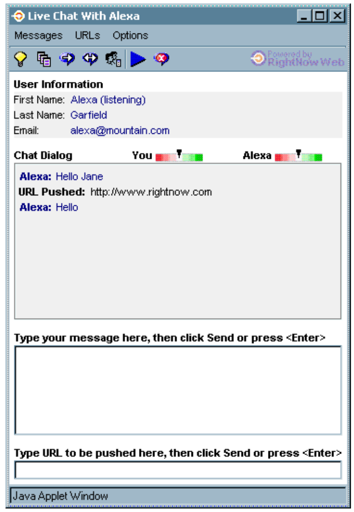

Figure 6-25: Live Chat Window after Co-browse

The URL that was pushed when you initiated co-browse will be listed in your Chat Dialog box. The end-user's Chat Dialog box lists the URL that was received (`URL Received...`).

Form Assistance

New

Form assistance is a subset of RightNow Live collaboration that allows an end-user to share a form and its content with an agent to help the end-user complete the form. This capability addresses the issue of end-users abandoning shopping carts because they are unable to fill in a particular field(s) on a form. Your RightNow administrator must configure and code the form assistance option for your RightNow application. Here is how it works:

Suppose an end-user has added items to a shopping cart and proceeds to the checkout page. When filling out the form, the end-user has a question. On the order form is a **Need Assistance?** button, which the end-user clicks to initiate a Live chat.

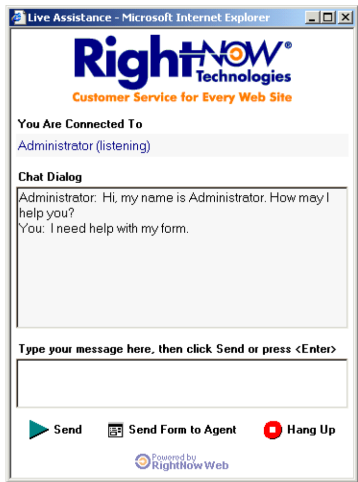

Figure 6-26: End-User Chat Window with Send Form Button

After chatting with the agent, the end-user clicks **Send Form to Agent** on the chat window to share the partially completed form with the agent. This opens the end-user's current URL on the agent's computer. The agent can then co-browse with the end-user and assist the end-user in completing the form.

Form assistance is a powerful addition to RightNow Live collaboration that can be customized for your organization's application. Talk with your RightNow administrator to see if this option has been configured for your system.

Selecting Standard Responses

Changed

Customized and frequently used responses can be prepared in advance so that you can quickly insert one into your message text box and send it to the end-user while you are engaged in a chat. This saves you time and eliminates typographical errors.

The Messages link will be available on the Live Chat window (refer to Figure 6-27) if standard responses have been defined and designated as Live responses from the Management and Configuration page (Reusable Content>Standard Responses). For information on creating standard responses for RightNow Live, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

To select a standard response:

1. Click Messages at the top of the Live Chat window. A list of the response folders that contain standard responses for RightNow Live will be displayed.

Path: Live Chat>Messages

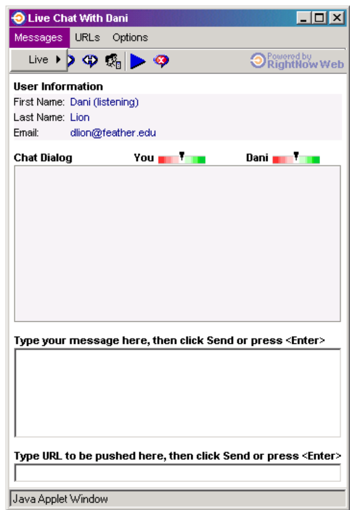

Figure 6-27: Messages Link

2. Click the appropriate folder to view the available responses.

Path: Live Chat>Messages>Response Folders

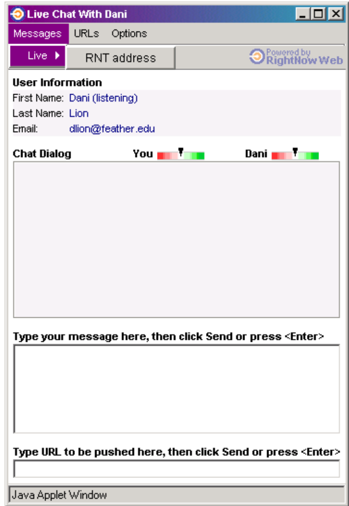

Figure 6-28: Choosing a Standard Response

Note: In Figure 6-28, the Live response folder contains one standard response (RNT address).

3. Select the appropriate response. The response text displays in your Live Chat message text box. You can edit this response or send it as is.

Pushing Standard URLs

Custom URLs can also be prepared in advance and made available from the URLs link on your Live Chat window. Having predefined URLs can save you time typing long addresses and will eliminate mistakes. As with standard responses, if any standard URLs have been designated as Live URLs and entered in the Standard Responses menu accessed from the Management and Configuration page (Reusable Content>Standard Responses), a URLs link will be available on the Live Chat window (refer to Figure 6-29).

Note: For information on defining URLs for RightNow Live, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

To send a standard URL:

1. Click URLs at the top of the Live Chat window.

Path: Live Chat>URLs

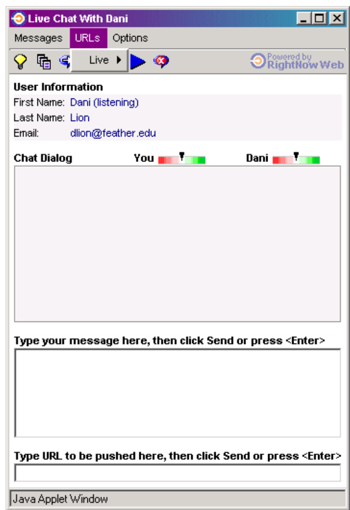

Figure 6-29: URLs Link

2. Click the appropriate folder to view the standard URLs available.

Path: Live Chat>URLs>URLs Folders

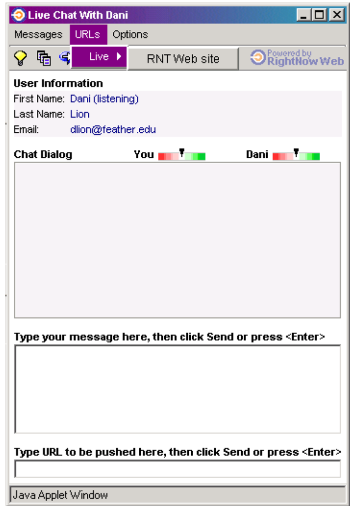

Figure 6-30: Choosing a Standard URL

Note: In Figure 6-30, the Live URLs folder contains one standard URL (RNT Web site).

3. Select the URL you want to push to the end-user's screen. The URL will display in your URL text box. You can edit this URL or send it as is.

Ending a Chat Session

An end-user clicks Hang Up to end a chat session. A message on your Live Chat window informs you that the end-user has disconnected.

Path: Chat Session> Hang Up

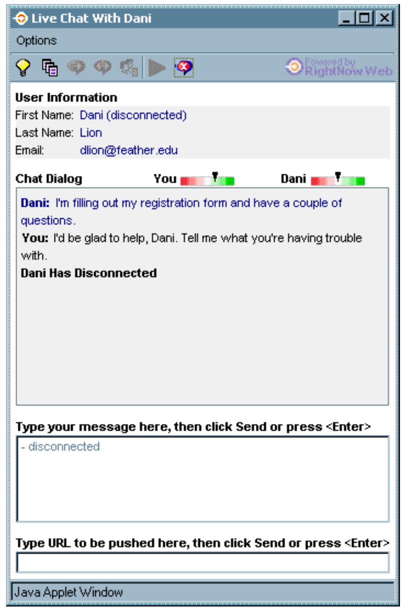

Figure 6-31: End-User Disconnects

When the end-user hangs up, the message `disconnected` displays on your Live Chat window, and the message `disconnected` displays in the message text box. You can no longer enter text.

Note: You can click to end a chat session with the end-user. A similar message displays on the end-user's chat window.

Creating an Incident from a Chat Session

If enabled, you can turn the complete dialog from a chat session into an incident. When either you or the end-user disconnect from the chat session, a window displays prompting you to create an incident from the chat session.

Note: If you choose to create an incident, it will be assigned to you in the status you specify. The dialog from the chat session will be inserted as a response thread. (Refer to Chapter 4, "Incident Console.")

Figure 6-32: Create Incident Prompt Window

To create an incident from a chat session:

1. Click the radio button next to the appropriate option:

- ▷ No Incident—The chat session will not be saved as an incident.
- ▷ Solved Incident—The chat session will be saved as a solved incident.
- ▷ Unresolved Incident—The chat session will be saved as an unresolved incident.

2. Click **OK**.

Note: Your RightNow administrator can set the default option for this feature. For more information, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

Receiving a Callback Request

End-users who want to speak to a customer service representative or sales person instead of using real-time chat can request a telephone callback on the Live Assistance page (see “Live Assistance Page” on page 6-8). The information the end-user must fill in can be configured by your RightNow administrator.

The call will be routed to the available agent idle the longest. If you receive the call, the Callback Request window will appear:

Figure 6-33: Callback Request Window

To accept the callback request, click **Accept**; to decline, click **Decline**.

If you accept the callback request, the end-user will receive the following message:

Path: Live Assistance>Callback Request> **Accept**

Figure 6-34: End-User Callback Request Message

You can then call the end-user to visit over the telephone. Your Callback Request window will then change to the following:

Path: Callback Request> **Accept**

Figure 6-35: Callback Request with Open Chat Session Option

To turn a phone session into a chat session:

At any time during your phone conversation you can open a chat session by clicking **Open Chat Session**. For information on chat sessions, refer to “Chatting with an End-User” on page 6-12.

Incident and Customer Consoles Views

A view is a unique display of the consoles in RightNow, including the Incident, Customer, and Answer Consoles. (Views are also defined for the Search page and My Stuff—Questions page of the end-user pages.) A view consists of the search criteria drop-down menus, the options in the Field drop-down menu, the sort order of records, the fields displayed, the width of the field displayed, and the number of records displayed per page.

Through the Manage Views function, you can customize your views to display only the information that is most useful for the work you do. Here are some examples of how you can customize your views:

- Add the Customer SmartSense field as a display field for your Incident Console view and specify whether you want the rating description (–3 to +3) or the SmartSense meter displayed. You can then sort incidents by the SmartSense field to quickly see the incidents that need immediate attention (where end-users expressed anger or dissatisfaction with a product or service that would register a negative rating on the SmartSense meter). New
- Set your name as the default value in the Assigned field for the Incident Console. Then, when you open the Incident Console, only the incidents assigned to you will be displayed.
- Add the first name field as an option in the Field drop-down menu on the Customer Console. This would allow you to search for customers by first name, which you may be more familiar with than last name.
- Group incidents or customers rather than viewing one large list. You can define up to five levels for grouping by criteria; the more levels you use, the finer the detail will be. For each additional level you define, you will see more detail as incidents or customers are broken down into smaller groups. New

This chapter contains procedures for creating both Incident and Customer Console views using a sample Incident Console view. Although there are differences in the fields that are available for display on the two consoles (for example, the Incident Console contains incident fields, whereas the Customer Console contains customer and company fields), the steps for creating either view are the same.

Note: You must have manage views privileges set in your security profile to create and edit views. If you have a limited access profile, you may have only one permanent Incident Console view and one Customer Console view, and the Manage Views function will not be available. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for information about security profiles and Answer Console and end-user pages views.

Key Terms

As you work with the Manage Views function, you will want to become familiar with the key terms associated with creating and editing views.

Display format—The display fields that show incident details on the Incident Console, customer details on the Customer Console, and answer fields on the Answer Console. The fields specified in the display format section of your view contain the actual information from each incident, customer, or answer. You can also choose the width of the columns and the order that each column is displayed.

Group by criteria—A drill-down feature in Manage Views that allows staff members to search by groups and have RightNow return a list that meets the criteria. You can define up to five levels for grouping by criteria; the more levels you use, the finer the detail will be. For each additional level you define, you will see more detail as incidents or customers are broken down into smaller groups. Staff members can then drill down within the group to view individual incidents or customers.

Manage views privileges—An option in a staff member's security profile that allows the staff member to modify or create views.

Search criteria—The values in the Field drop-down menu on the Incident Console or Customer Console. Options in the Field drop-down menu allow staff members to specify the search type or field that will be used when executing a text search.

Selection criteria—The drop-down menus at the top of the Incident Console or Customer Console that staff members use to run queries for particular sets of incidents or customers. The values in the drop-down menus create the search criteria used for the initial search that runs the first time staff members open the Incident or Customer Console.

Figure 7-1 shows the default view for the Incident Console.

Path:

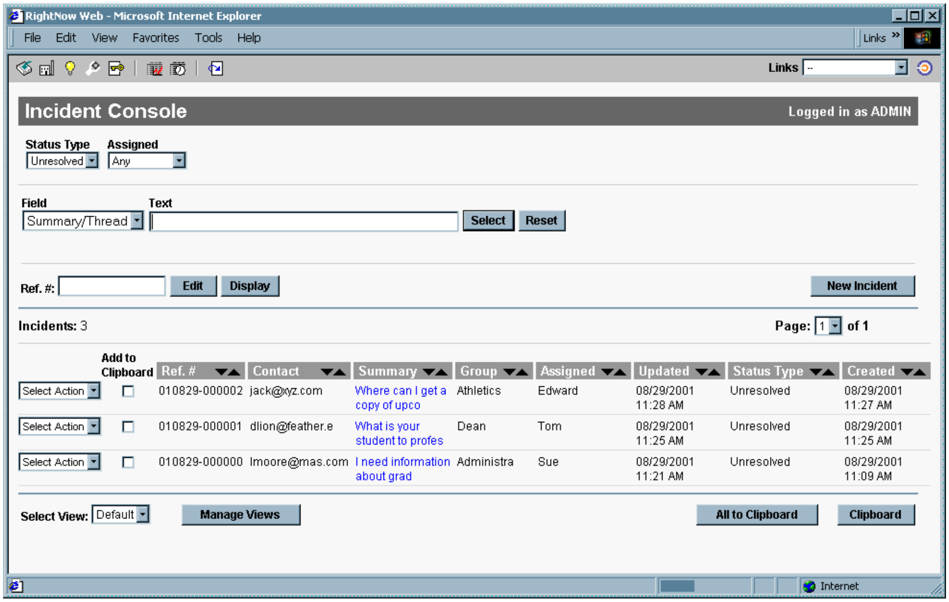

Figure 7-1: Incident Console—Default View

For an Incident Console view, you can specify the fields that display the incident details and change any of the default fields shown here. You can also specify which drop-down menus are available for selecting particular sets of incidents. For example, if your RightNow administrator has configured your site with products and categories, you may want to display the Product drop-down menu if you often search for your incidents by product.

Note: If you do not have manage views privileges, the Manage Views button will not be available on the Incident or Customer Console.

Figure 7-2 shows the default view for the Customer Console.

Path: 

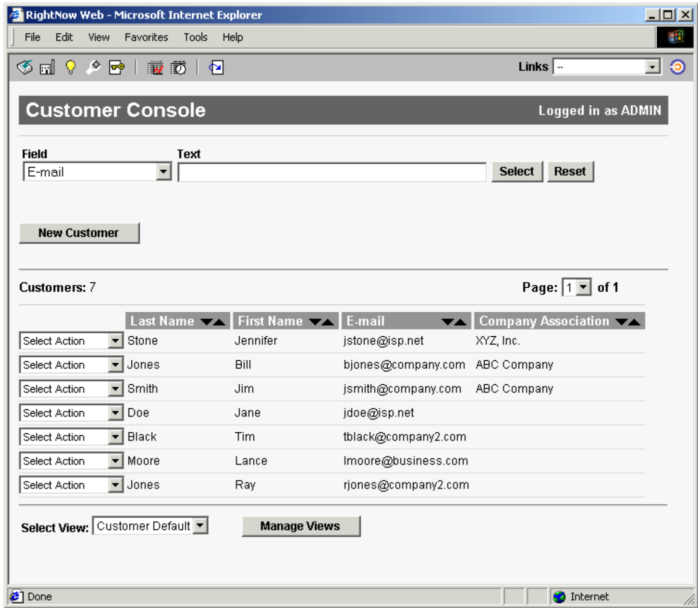

Figure 7-2: Customer Console—Default View

For a Customer Console view, you also have control over the display fields, search criteria, and drop-down menus, although in a Customer Console view the fields pertain to customer and company information. For example, you can include display fields such as address or phone number if you often need this information.

Creating an Incident or Customer Console View

Note: We strongly recommend that you do not edit the default views, but create new views and use those as your default views. For instructions on making a view your default, refer to "Specifying a Default View" on page 7-25.

The instructions in this chapter for creating a view are divided into four procedures and follow the order on the Edit View page:

- Choose the selection criteria drop-down menus (refer to "Choosing the Selection Criteria" on page 7-8)
- Choose the search options in the Field drop-down menu (refer to "Choosing the Search Criteria" on page 7-12)
- Choose the fields that are displayed for each incident (refer to "Choosing the Display Format" on page 7-15)
- Choose the group by criteria (refer to "Choosing Group by Criteria" on page 7-20)

The samples used here are for an Incident Console view. Although the fields may be slightly different from a Customer Console view, the steps are the same.

To open the Manage Views page:

1. Click on the icon toolbar to open the Management and Configuration page.

2. Click Administration under the Views group.

***Path:* >Views>Administration**

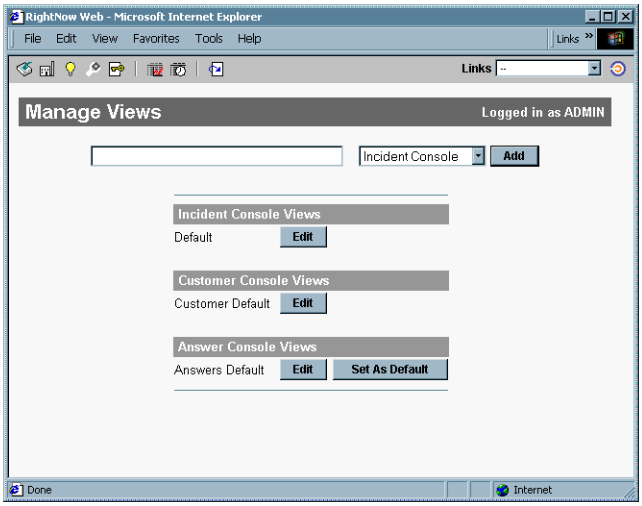

Figure 7-3: Manage Views Page

Figure 7-3 displays the current views for the Incident Console, Customer Console, and Answer Console.

Note: To display the views for end-user pages, click End User under the Views group.

3. To change the type of view you want to create, click the drop-down menu at the top of the page and select the appropriate console (Incident Console is the default).

4. Type the name of the view in the text box and click Add. The new view will appear under the appropriate console views column.

5. Click Edit next to the new view to open the Edit View page.

Note: You can also access the Manage Views page from both the Incident and Customer Consoles; however, when you click Manage Views from one of the consoles, the only views you will see are those for that particular console.

Path: ***>Views>Administration>*** Add > Edit

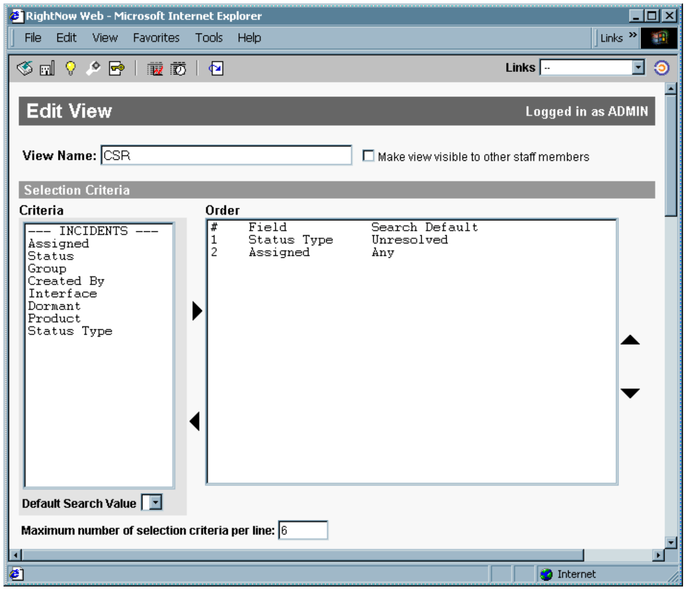

Figure 7-4: Edit View Page—Selection Criteria

The Edit View page is divided into four sections:

- Selection Criteria
- Search Criteria
- Display Format
- Group by Criteria

Procedures in this chapter follow the order on the Edit View page; however, you can work on the sections in any order. You can also create or edit a view in stages; click Save to save your changes and return at a later time.

Choosing the Selection Criteria

Choosing selection criteria consists of defining the drop-down menus that appear at the top of the Incident Console or Customer Console. These drop-down menus allow you to quickly run queries for particular sets of incidents or customers. You can also specify a default value for each drop-down menu. The default values create the search criteria used for the initial search that runs the first time you open the Incident or Customer Console.

Incident Console

Figure 7-5 shows the default selection criteria drop-down menus as they appear on the Incident Console.

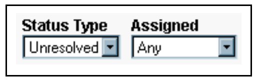

Figure 7-5: Incident Console—Selection Criteria

Refer to Figure 7-1, “Incident Console—Default View,” on page 7-3 to see where the selection criteria drop-down menus appear on the Incident Console.

Note: A maximum of 20 selection criteria drop-down menus can be displayed on the Incident Console.

Customer Console

The configuration for the Customer Console default view contains no selection criteria drop-down menus. The drop-down menus must be defined from the customer custom or company custom fields that have been added by your RightNow administrator. In the default RightNow configuration, there are no customer or company custom fields. Refer to Figure 7-2, “Customer Console—Default View,” on page 7-4.

To choose the selection criteria:

1. To make your view available to other staff members,

   select ☐ Make view visible to other staff members. The view will appear on the Manage Views page on the Incident Console. If you want to be the only person who can access the view, do not select this check box.

2. To add a drop-down menu, select a field in the Criteria box and then click ▶ to move the field to the Order box.
3. To populate a drop-down menu, select a field in either the Criteria box or the Order box, and then select a value from the Default Search Value drop-down menu. The chosen value will automatically become the search default and will be visible in the Order box.
4. To change the order of the drop-down menus as they appear from left to right across the top of the Incident Console, select a field in the Order box:
   - To move the field to a lower order (left on the Incident Console), click ▲.
   - To move the field to a higher order (right on the Incident Console), click ▼.

   Note: The option with Order 1 will appear farthest left.
5. To remove a drop-down menu from the Incident Console, select the field in the Order box and click ◀.
6. To set a maximum number of drop-down menus per line across the top of the Incident Console, type a number in the Maximum Number of Selection Criteria per Line field. The default value is 6.

Table 7-1 describes the fields and buttons that appear in the selection criteria section on the Edit View page.

Table 7-1: Edit View Page—Selection Criteria Field Descriptions

Field	Description
View Name	The name of the view.
Make view visible to other staff members	Select this check box to allow other staff members to access this view. If not selected (the default), only the staff member who created the view may access it.
Criteria	This panel contains the fields that are available as drop-down menus on the Incident or Customer Console. For the Incident Console, the available fields include incident, incident custom, and customer custom fields. For the Customer Console, the available fields include customer custom fields. Only fields that are specified as menu type fields can be used as selection criteria. **Note: The fields that are available depend on how your RightNow administrator has configured your site. For example, if your administrator has not configured categories for your site, then the categories field will not appear as a criteria choice for an Incident Console view.**
▶	Click this arrow to add a selection criteria drop-down menu. When you click this button, the selected field will appear in the Order panel. **Note: A field in the Criteria panel must be selected.**
◀	Click this arrow to remove a selection criteria drop-down menu. When you select a drop-down menu and click this button, the field will be removed from the Order panel.
Order	This panel displays the selection criteria drop-down menus that will be displayed on the Incident or Customer Console. The three columns in this panel include #, Field, and Search Default.
#	This column displays the order that the drop-down menus appear on the top of the Incident or Customer Console. The field with Order 1 appears farthest to the left.
Field	This column displays the name of the field.
Search Default	This column displays the default value displayed in the drop-down menu. By specifying default values, you create a default search that will run and display a set of incidents each time you open the Incident Console or a set of customers the first time you open the Customer Console.
▲	Click this button to move the field to a lower numerical order. This moves the field to a lower numerical order in the Order panel and moves the drop-down menu one position to the left on the Incident or Customer Console. The field with Order 1 is the drop-down menu farthest to the left.

Table 7-1: Edit View Page—Selection Criteria Field Descriptions (Continued)

Field	Description
	Click this button to move the field to a higher numerical order. This moves the field to a higher numerical order in the Order panel and moves the drop-down menu one position to the right on the Incident or Customer Console.
Default Search Value	Click this drop-down menu to select the default display value in the drop-down menu. **Note: The appropriate field must be selected in the Criteria or Order panel.**
Maximum number of selection criteria per line 6	Type a number in this field to set a maximum number of selection criteria drop-down menus per line across the top of the Incident or Customer Console. The default value is 6.

Choosing the Search Criteria

The search criteria for your view consist of the values in the Field drop-down menu on the Incident or Customer Console. This drop-down menu allows you to specify the search type or field that will be used when executing a text search. Search criteria appears second on the Edit View page.

Incident Console

Changed

Figure 7-6 shows the Field drop-down menu and Text search box as they appear on the Incident Console.

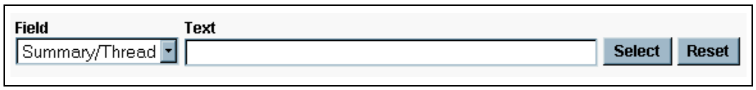

Figure 7-6: Incident Console—Search Criteria

To see where the Field drop-down menu appears, refer to Figure 7-1, “Incident Console—Default View,” on page 7-3. (For specific information about Summary / Thread, refer to Chapter 4, “Incident Console.”)

Customer Console

Figure 7-7 shows the Field drop-down menu and Text search box as they appear on the Customer Console.

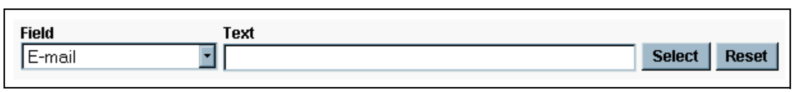

Figure 7-7: Customer Console—Search Criteria

To see where the Field drop-down menu appears, refer to Figure 7-2, “Customer Console—Default View,” on page 7-4.

Path: ***>Views>Administration>*** Add > Edit

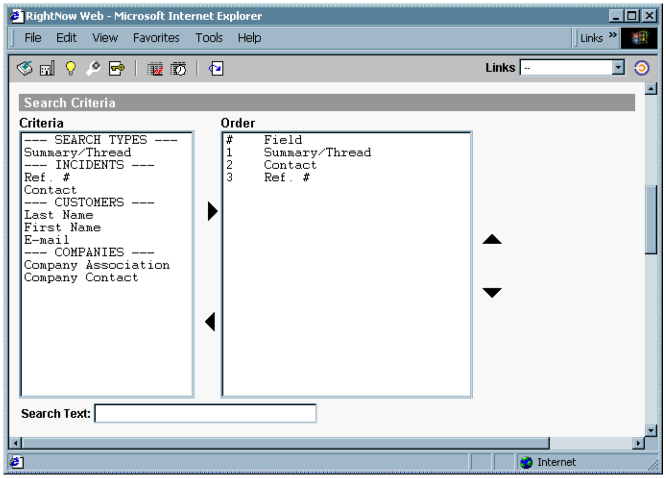

Figure 7-8: Edit View Page—Search Criteria

To choose the search criteria:

1. To add a search criteria option, select the search option in the Criteria box and click to move it to the Order box.
2. To change the order of the options as they appear in the Field drop-down menu, select the option in the Order box:
   - To move the option to a lower order (higher in the drop-down), click . The option will move up one order.
   - To move the option to a higher order (lower in the drop-down), click . The option will move down one order.

   Note: The option with Order 1 appears first in the drop-down menu list and is the default search criteria.
3. To specify text that will populate the Text search field on the Incident Console, type the text in the Search Text box.
4. To remove an option from the Field drop-down menu, select the option in the Order box and click .

Table 7-2 describes the fields and buttons that appear in the search criteria section on the Edit View page.

Table 7-2: Edit View Page—Search Criteria Field Descriptions

Field	Description
Criteria	This panel contains the fields that can be used as options in the Field drop-down menus on the Incident or Customer Console. For the Incident Console, these fields include search types, incident, incident custom, customer, customer custom, and company fields. For the Customer Console, these fields include customer, customer custom, company, and company custom fields. All field types, except menu, can be used as search criteria, including radio, integer, date, date/time, text field, and text area types. For more information on field types, refer to the *RightNow Web eService Center 5.0 Administration Manual.* **Note: The fields that are available depend on how your RightNow administrator has configured your site.**
▶	Click this arrow to add an option to the Field drop-down menu. **Note: A field in the Criteria panel must be selected.**
◀	Click this arrow to remove an option from the Field drop-down menu.
Order	This panel displays the current options in the Field drop-down menu on the Incident or Customer Console. The columns in this panel include # and Field.
#	This column displays the order that the options appear in the Field drop-down menus. **Note: The option with Order 1 appears first in the drop-down menu list and is the default search criteria.**
Field	This column displays the name of the field.
▲	Click this button to move the option to a lower numerical order. This moves the option to a lower numerical order in the Order panel and moves the option one position higher in the Field drop-down menu.
▼	Click this button to move the option to a higher numerical order. This moves the option to a higher numerical order in the Order panel and moves the option one position lower in the Field drop-down menu.
Search Text box	Type the text that will populate the Search Text box the first time you access the Incident or Customer Console. By specifying default text, you can create a default search that will run and display a set of incidents the first time you open the Incident Console or a set of customers the first time you open the Customer Console.

Choosing the Display Format

The display format is the third section on the Edit View page and consists of the display fields that show the incidents details on the Incident Console or the customer details on the Customer Console. These fields contain the actual information from each incident or customer record. You can also choose the width and sort order for each column.

Incident Console

Figure 7-9 shows the display format fields on the Incident Console. The fields include Ref #, Contact, Summary, Group, Assigned, Updated, Status Type, and Created.

Figure 7-9: Incident Console—Display Format

To see where the display format fields appear, refer to Figure 7-1, “Incident Console—Default View,” on page 7-3.

Customer Console

Figure 7-10 shows the display format fields on the Customer Console. The fields include Last Name, First Name, Email, and Company Association.

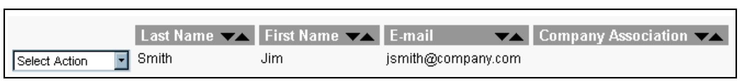

Figure 7-10: Customer Console—Display Format

To see where the display format fields appear, refer to Figure 7-2, “Customer Console—Default View,” on page 7-4.

Path: ***>Views>Administration>*** Add > Edit

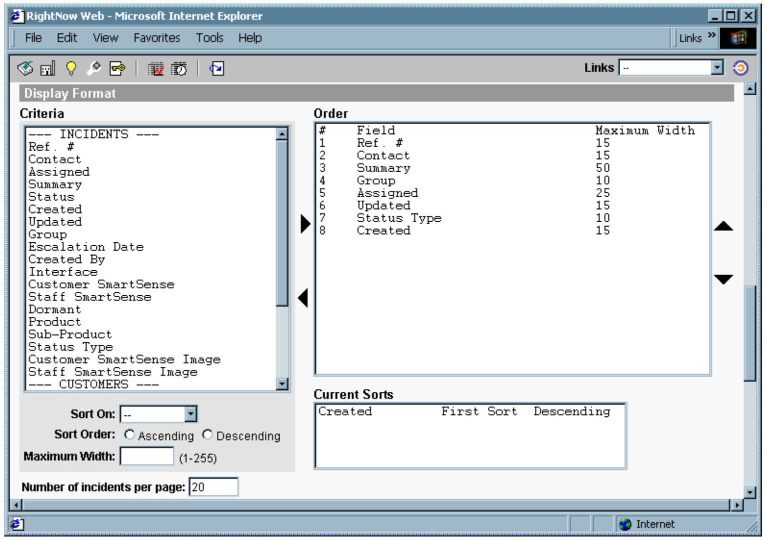

Figure 7-11: Edit View Page—Display Format

To choose the display format:

Note: Refer to Table 7-3, “Edit View Page—Display Format Field Descriptions,” on page 7-17 for field descriptions.

1. To add a display field to the Incident Console, select the field in the Criteria box, and then click ▶ to move the field to the Order box.
2. To specify a sort for a field, select the field in either the Criteria box or the Order box, and then select a sort from the Sort On drop-down menu. The chosen value will automatically become the field’s sort and will be visible in the Current Sorts box.

   The sort values specify which fields are used to sort the incidents as they are displayed on the Incident Console. By default, the Created field is the First Sort. Fields that are not displayed on the Incident Console can also be given a sort. The fields that have a sort are shown in the Current Sorts box.
3. To specify a sort order for a field, select the field in the Criteria or Order panel:
   - ▷ To choose an ascending sort order, click ○ Ascending.
   - ▷ To choose a descending order (default sort order), click ◉ Descending.

   The chosen value will automatically become the field’s sort order and will be visible in the Current Sorts box.
4. To change the order of the display fields as they will appear from left to right on the Incident Console, select a field in the Order box:

- ▷ To move the field to a lower order (left on the Incident Console), click ▲.
- ▷ To move the field to a higher order (right on the Incident Console), click ▼.

Note: The field with Order 1 will appear farthest on the left.

5. To set a maximum display width for the field column, click the field in either the Criteria box or the Order box. Type a width in characters in the Maximum Width field, and then press **Enter**. The chosen value will become the field's column width and will be visible in the Width column in the Order box.
6. To remove a display field from the Incident Console, select the field in the Order box and click ◀.
7. To specify a maximum number of incidents displayed per page, type a number in the Number of Incidents Per Page field.

Table 7-3 describes the fields and buttons that appear in the display format section on the Edit View page.

Table 7-3: Edit View Page—Display Format Field Descriptions

Field	Description
Criteria	This panel contains the fields that can be used as display fields for the incident details on the Incident Console or customer details on the Customer Console. For the Incident Console, these fields include incident, incident custom, customer, customer custom, company, and display field attributes fields. For the Customer Console, these fields include customer, customer custom, companies, and display field attributes fields. All field types can be used as display format, including menu, radio, integer, date, date/time, text field, and text area types. For more information on field types, refer to the *Right Now Web eService Center 5.0 Administration Manual*. **Note: The fields that are available depend on how your RightNow administrator has configured your site.**
	Click this drop-down menu to select a sort order: First Sort to Fifth Sort and also no sort, represented by a blank value. **Note: A field must be selected in the Criteria or Order panel.** Sort values determine which fields are used to sort the order of incidents as they are displayed on the Incident Console or the sort order of customers on the Customer Console. For example, in an Incident Console view, if the product field is the First Sort, then the incidents will be displayed in alphabetical order by product. If the date created field is the Second Sort, then the incidents within the alphabetical product groupings would be sorted by the date created. **Note: By default, the Created field is the First Sort for Incident Console views, and the Company Association field is the First Sort for Customer Console views. Fields that are not displayed on the Incident Console can also be given a sort. The fields that have a sort are shown in the Current Sorts.**

Table 7-3: Edit View Page—Display Format Field Descriptions (Continued)

Field	Description
	Click this radio button to specify an ascending sort order for a field. For example, if the field is an integer field, an ascending order will display from the smallest number to the largest. **Note: A field must be selected in the Criteria or Order field to change the sort order. For the sort order of a field to be used, the field must have a sort value, such as First Sort.**
	Click this radio button to specify a descending sort order for a field. The descending order is the default setting. For example, if the field is a text field, then a descending order will display alphabetically from Z to A. **Note: A field must be selected in the Criteria or Order field to change the sort order. For the sort order of a field to be used, the field must have a sort value, such as First Sort.**
Maximum Width	Type a width in characters to set the column width of the display field, and then press **Enter**. **Note: You may want to set the contact field maximum width to 15 or 20 characters, since most email addresses are less than 20 characters, and set the summary field maximum width to 50 characters or more.**
	Click this arrow to add a display field to the Order panel.
	Click this arrow to remove a display field from the Order panel.
Order	This panel displays the current display fields shown on the Incident or Customer Console. The three columns in this panel include #, Field, and Maximum Width.
#	This column displays the order that the field columns appear on the Incident or Customer Console from left to right. The field with Order 1 is the field farthest to the left.
Field	This column displays the name of the field.
Maximum Width	This column displays the width in characters of this field as it is displayed on the Incident or Customer Console.
Current Sorts	This panel displays the fields that are currently used to sort the incidents displayed on the Incident Console or the customers displayed on the Customer Console. **Note: This panel shows the field name, sort, and sort order. The headings for these columns are implied.**
Field Name	This column displays the name of the field.

Table 7-3: Edit View Page—Display Format Field Descriptions (Continued)

Field	Description
Sort	This column displays the sort of the field: First Sort to Fifth Sort and also no sort, represented by a blank value. Sort values determine which fields are used to sort the order of incidents as they are displayed on the Incident Console. For example, if the product field is the First Sort, then the incidents will be displayed in alphabetical order by product. If the date created field is the Second Sort, then the incidents within the alphabetical product groupings would be sorted by the date created.
Sort Order	This column displays the sort order of the field, either ascending or descending. The default sort order is descending. Sort order is used only for the fields that have a sort value such as First Sort. The sort (not sort order) determines which fields are used to sort the incidents as they are displayed.
▲	Click this button to move the field to a lower order. This moves the field to a lower order in the Order panel and moves the column one position to the left on the Incident Console. The field with Order 1 is the column farthest to the left.
▼	Click this button to move the field to a higher order. This moves the field to a higher order in the Order panel and moves the column one position to the right on the Incident Console. The field with Order 1 is the column farthest to the left.
Number of incidents per page: 20	Type a number in this field to specify a maximum number of incidents displayed per page. The default is 20.

Choosing Group by Criteria

New

Your Incident or Customer Console view displays incidents or customers based on the selection criteria, search criteria, and display format defined in your view. While this view may be the one you use most often, you may want to view incidents or customers in your database in a different way.

The group by criteria feature provides a more organized view of your Incident and Customer Consoles. Rather than viewing one large list, the group by criteria feature allows you to view incidents or customers in groups. You can define up to five levels for grouping by criteria; the more levels you use, the finer the detail will be. For each additional level you define, you will see more detail as incidents or customers are broken down into smaller groups.

Grouping by specific criteria shows the number of incidents or customers that meet your criteria, which can be beneficial when working with large incident and customer databases. You can then drill down to see each incident or customer within each group. The group by criteria option applies to all consoles and provides you with additional flexibility in displaying information.

The following examples show how certain staff members might use the group by criteria option in a view:

- Administrators or supervisors could set the top level to group by the staff group field and the second level to group by individual staff members. This view would show the number of incidents assigned to each group and each staff member within each group.
- CSRs could set the group by criteria to the product field to see the number of incidents for each product defined for their site. This would be effective for CSRs who are responsible for incidents dealing with one or two specific products.

Note: When choosing fields to group by, do not pick fields that have a unique value for each record, since no grouping can be done.

Incident Console

Figure 7-12 and Figure 7-13 show a much different view of the Incident Console. In this view, we set Level 1 to group by the Group field, and Level 2 to group by the Assigned field.

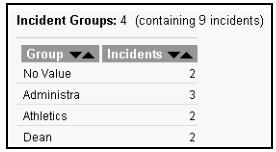

Figure 7-12: Incidents Grouped by the Group Field

In the top level, there are four groups and a total of nine incidents. At this level, you can see the number of incidents in your knowledge base and how the incidents are divided among the groups responsible for working on incidents.

Double-click any group to drill down to the next level. (We double-clicked the Administration group.)

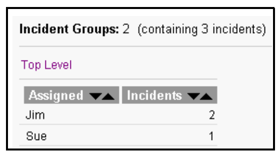

Figure 7-13: Second Level

In the second level, you see the staff members within the Administration group and the number of incidents assigned to each. The Administration group has three incidents, with specific incidents assigned to staff members Jim and Sue.

Double-click a staff member to see the individual incidents. The fields that will be displayed when you drill down depend on the fields you defined in the display format section of your view (“Choosing the Display Format” on page 7-15).

You can also click Top Level to return to the top-level view (shown in Figure 7-12).

Customer Console

Figure 7-14 shows a Customer Console view in which customers are grouped by user type (a customer custom field). In the group by criteria section of the Edit View page, the User Type field was added to the Level 1 order panel.

Figure 7-14: Customers Grouped by Customer Custom Field

In this view, you can see that the customer database contains 12 customers—4 students and 8 visitors. Double-click a row to drill down to the individual customers within that group. The fields that will be displayed when you drill down depend on the fields you defined in the display format section of your view (“Choosing the Display Format” on page 7-15).

Path: ***>Views>Administration>*** **Add** > **Edit**

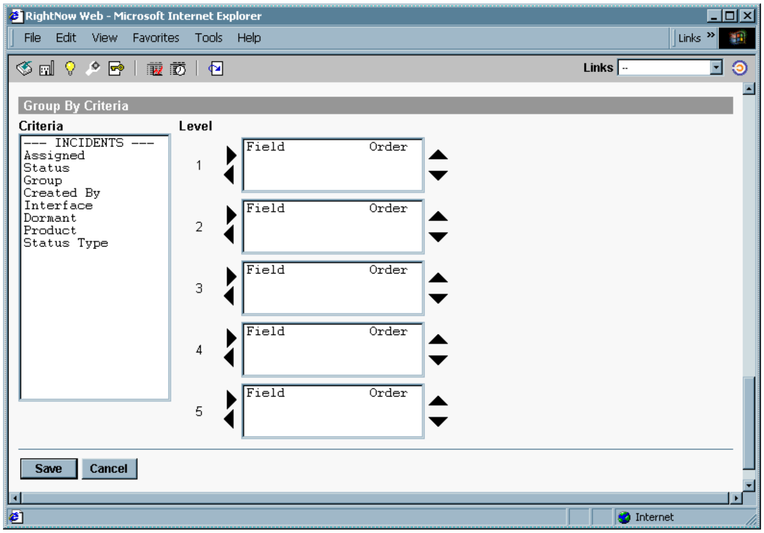

Figure 7-15: Edit View Page—Group by Criteria

To choose the group by criteria:

Note: Refer to Table 7-4, “Edit View Page—Group by Criteria Field Descriptions,” on page 7-24 for field descriptions.

1. To add a field to group incidents or customers by, select the field in the Criteria box, and then click ▶ next to the appropriate level to move it to the Order box.
2. To change the order of the fields as they appear on the Incident or Customer Console, select a field in the Order box:
   - To move the field to a lower order (left on the Incident Console), click ▲.
   - To move the field to a higher order (right on the Incident Console), click ▼.

   Note: The option with Order 1 will appear farthest left.
3. To remove a field from a group by criteria level, select the field in the Order box and click ◀.

4. Click **Save** to save the new view. You will return to the Manage Views page.

Table 7-4: Edit View Page—Group by Criteria Field Descriptions

Field	**Description**
Criteria	This panel contains the fields that can be used as group by criteria fields for incidents on the Incident Console or customers on the Customer Console. For the Incident Console, these fields include incident, incident custom, customer, customer custom, company, and company custom fields. For the Customer Console, these fields include customer, customer custom, company, and company custom fields. All field types can be used. For more information on field types, refer to the *RightNow Web eService Center 5.0 Administration Manual.* **Note: The fields that are available depend on how your RightNow administrator has configured your site.**
Level	This column determines how many levels your group by criteria will contain and corresponds to the Order panel.
▶	Click this arrow next to the level number you want this field added to in the Order panel. When you click this button, the selected field will appear in the Order panel. **Note: A field in the Criteria panel must be selected.**
◀	Click this arrow to remove a field used to group incidents or customers. When you select a field and click this button, the field will be removed from the Order panel.
Order	This panel displays the fields that will be used to group incidents or customers. The fields listed in each level will be displayed on the Incident or Customer Console beginning with Level 1 (top level). The two columns in this panel are Field and Order.
Field	This column displays the name of the field.
Order	This column displays the order the fields will appear from left to right.
▲	Click this button to move the field to a lower numerical order. This moves the field to a lower numerical order in the Order panel and moves the field one position to the left on the Incident or Customer Console. The field with Order 1 is the field farthest to the left.
▼	Click this button to move the field to a higher numerical order. This moves the field to a higher numerical order in the Order panel and moves the field one position to the right on the Incident or Customer Console.

This completes the procedures for creating a view. You can edit your view(s) in the same manner by clicking **Edit** next to the appropriate view on the Manage Views page.

Specifying a Default View

You can choose a view that will be automatically displayed when you open the Incident and Customer Consoles. Setting a default view affects your default views only, not other staff members.

Note: Staff members with limited access profiles may have only one permanent view, and the Manage Views function may not be available.

To specify a default Incident Console or Customer Console view:

1. Click on the icon toolbar.

2. Click Administration under the Views group.

Note: Remember that you can also access the Manage Views page from the Incident or Customer Console by clicking Manage Views; however, when you open the Manage Views page from one of the consoles, the only views you will see are those for that particular console.

Path: ***>Views>Administration***

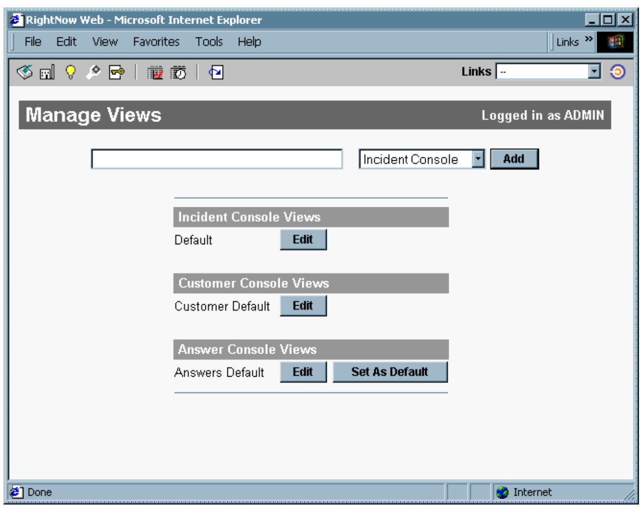

Figure 7-16: Manage Views Page—Setting Default Views

3. Click Set As Default next to the view that you want to be your default view.

Customer Console

As you work with incidents in the knowledge base, you will often need information about the customer (end-user) who submitted a question or requested information. RightNow makes it easy for you to keep track of your customers and their questions and issues through your customer database. As described in Chapter 3, “End-User Pages,” RightNow can be configured to allow customers to create accounts; accounts can also be created by staff members. And each customer account creates a record in your database that you can access as you work on and solve incidents.

Note: By default, eService Center 5.0 automatically creates a new customer record when end-users request a Live chat and do not have a customer account. See the *RightNow Web eService Center 5.0 Administration Manual* for details.

The Customer Console is the entry point to your customer database where you can quickly access important details about a customer that can be extremely useful when you are working on incidents. In addition to viewing the list of customers in your database, you can perform the following functions from the Customer Console and associated pages:

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- Search the database for specific customers
- Add and update customer and company records
- Issue support contracts
- View a list of all the questions a customer or company has submitted
- Define Privileged Access login information for customers associated with a specific company
- Add an incident to the database while viewing a customer record

In this chapter you will see how maintaining an up-to-date customer database can assist you in your daily tasks, while at the same time help you assist customers more efficiently. This chapter contains procedures for editing customer records, adding new customers, changing company association, and issuing support contracts.

Key Terms

As you work with your customer database, you will want to become familiar with the key terms associated with the Customer Console and associated pages:

Company association—A feature for associating a customer with a specific company. Company association links the incident history of the customer and company, allowing customers and customer service representatives to better track the incidents submitted by a company as a whole rather than individually. Company association also enables customers to view any privileged access answers designated in their customer record.

Contracts—A module for controlling the amount of support your customers receive. With the Contracts module enabled, customers can submit questions only if they have a designated support contract within eService Center 5.0 for your company.

Customer—A Web user who accesses and uses a Web site on which RightNow Web eService Center 5.0 is installed; any end-user who has a customer account and associated record in the customer database.

Customer account—An account consisting of a user ID and password that allows your customers (end-users) to access restricted functions in RightNow, including Ask a Question, My Stuff, and Privileged Access answers. Each customer account creates a record in the customer database accessed from the Customer Console.

Customer Console—The entry point to the customer database. Staff members use the Customer Console to view customer information supplied by customers when they create an account. Additional actions that a staff member can perform from the Customer Console include adding customers, editing customer records, associating new and existing customers with companies, changing company information, issuing contracts to customers, and designating answer access levels for viewing privileged access answers.

Privileged access answers—Answers that are assigned a custom access level for viewing by certain customers with the appropriate access level designated in their customer account. *See also* company association.

Views—The way items are displayed on a RightNow page. A view specifies the search criteria, sort order, columns displayed, width of displayed columns, and number of incidents, customers, or answers displayed on a particular page. In a view, you determine what information will be shown and how that information will be displayed based on what is most useful for you. If your security profile has manage views privileges, you can create and edit your Incident, Customer, and Answer Consoles views. Views can also be edited for certain end-user pages.

Accessing Customer Records

The default Customer Console view displays a list of all customers in your database, including first and last name, email address, and company association. The fields displayed on your Customer Console may differ from the examples used in this chapter, and depend on how your RightNow administrator has configured your site and your particular Customer Console view. All default fields are clearly noted in the field description tables. (For information on the Manage Views function, refer to Chapter 7, "Incident and Customer Consoles Views.")

To access the Customer Console:

From any administration page, click on the icon toolbar.

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Path:

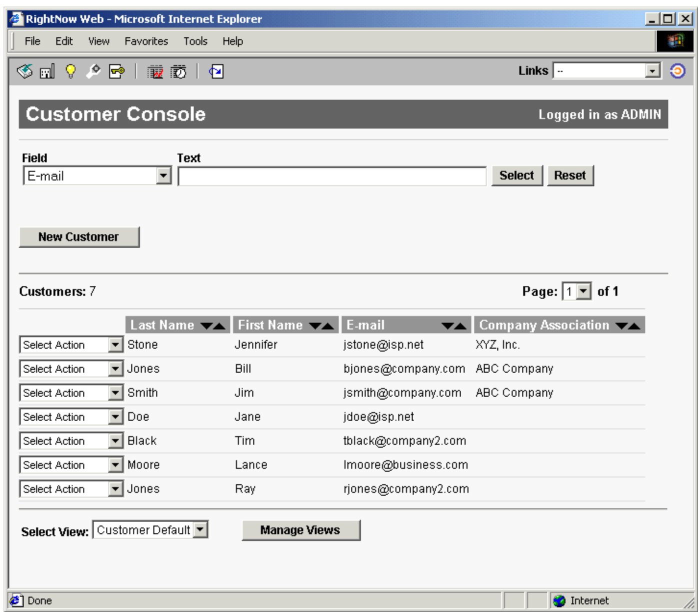


Figure 8-1: Customer Console Default View

The fields and buttons on the Customer Console are described in Table 8-1.

Table 8-1: Customer Console Field Descriptions

Function	Description
Field E-mail	Click this drop-down menu to select the search criteria to be used during a search. The default search criteria are Email, Company Association, and Last Name.
Email	This search criteria restricts the search to the email address field.
Company Association	This search criteria restricts the search to the Company Association field. **Note: Company Association searches are case-sensitive.**
Last Name	This search criteria restricts the search to the customer's last name. **Note: Last Name searches are case-sensitive.**
Text search box	Type the text to search for and click Select. **Note: Company Association and Last Name searches are case-sensitive.**
Select	Click this button to initiate the search after you have entered the search text and selected the search criteria.
Reset	Click this button to reset the search criteria to the default settings.
New Customer	Click this button to create a new customer. Refer to"Adding Customers to the Database" on page 8-25.
Select Action	Click this drop-down menu to select the action you want to perform: Display Customer, Edit Customer, Delete Customer, Change Company, Edit Company, History, and New Incident.
Last Name	This is the customer's last name.
First Name	This is the customer's first name.
Email	This is the email address that the customer entered on the Edit My Profile page on the end-user pages. The email address is used in the customer's incidents.
Company Association	This is the company that the customer is associated with. Not all customers are associated with a company; however, associating customers with a company enables all the questions submitted by employees of that company to be accessed together. (See "Associating Customers with Companies" on page 8-12.)
Select View: Customer Default	Select a Customer Console view from the drop-down menu. A view specifies the selection criteria, search criteria, sort order, columns displayed, width of displayed columns, and number of customers displayed on the Customer Console. Refer to Chapter 7, "Incident and Customer Consoles Views."
Manage Views	Click this button to create or edit a Customer Console view. See Chapter 7, "Incident and Customer Consoles Views." This button will not be available if your profile does not contain views privileges.

Searching the Customer Database

Searching for a specific customer or customers is easy using the Text search box and the Field drop-down menu. Search the database using one or more default criteria:

- Email
- Company Association
- Last Name

Note: Company Association and Last Name searches are case-sensitive; searches on the Email field are not.

If your security profile has manage views privileges, you can specify the options in the Field drop-down menu by editing your current Customer Console view or by creating a new view. For information on managing views, refer to Chapter 7, “Incident and Customer Consoles Views.”

To search for a customer:

1. Select the search criteria by clicking Field E-mail.

2. Type the text to search for in the Text search box and click Select. To find a specific customer, enter as much of the name, email address, or company name as you know. Wildcard searching is available on the Customer Console.

Examples:

▷ To find John Bowman, select Last Name from the Field drop-down menu. Type *man* in the Text search box and click Select. RightNow will return all customers with the text string **man** in their last name, including John Hoffman and Jim Bowman.

▷ If you search the Last Name field and enter `*S` in the Text search box, RightNow will return all last names that begin with the letter “S.”

▷ If you search the Last Name field and enter `*s` in the Text search box, RightNow will return all last names with the letter “s” somewhere in the last name (Edwards, Jones, Philips, Constantine).

Note: If you leave the Text search box blank and click Select, RightNow will return all customer records.

Searching by Multiple Criteria

New

When searching for a particular customer, you can use multiple criteria. For example, you could search for all customers associated with XYZ company in a particular state. (In this example, you would need a State customer custom field.)

To search using multiple criteria:

1. Select the first search criteria by clicking 

.
2. Type the text to search for in the Text search box.

   Note: Make sure you select the field first and then enter the criteria in the Text search box; otherwise, criteria will be set incorrectly, and search results will be unsatisfactory.

3. Select the second search criteria by clicking 

.
4. Type the text to search for in the Text search box and click 

.

   Note: When you specify criteria for a field, an asterisk will be displayed next to the field name when you use the drop-down menu again. In this way, when you specify criteria for a certain field, you can check the other fields that have criteria set.

5. To reset the search criteria to the defaults, click 

.

Viewing Customer Information

When customers create an account, they provide specific information about themselves and their company, if applicable. The information they are required to provide is determined by your RightNow administrator and configured for your site. You can view this information as you work on and solve customer questions and problems; you can also make changes to customer records to keep your customer database up-to-date.

You view individual customer records from the Customer Details page. This page is the primary location for viewing and modifying customer information, issuing support contracts, and viewing a customer's incident history.

To view a customer record:

From the Customer Console, click Select Action next to the appropriate customer and select Display Customer.

Path: > Select Action ***>Display Customer***

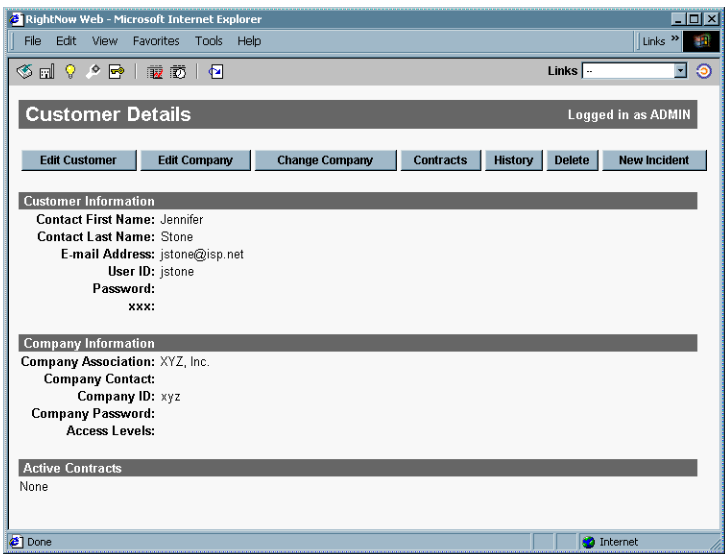


Figure 8-2: Customer Details Page—Viewing a Customer Record

Note: The fields displayed on the Customer Details page depend on how your RightNow administrator has configured your site.

The Customer Details page displays the customer record in three sections:

Customer Information—The default customer information includes the customer's email address, first and last name, user ID, and password. Any customer custom fields with administrative edit visibility will also be displayed here.

Company Information—The default company information includes the associated company's name, company contact, company ID and password, and access levels of the viewable answers in Privileged Access. Any company custom fields with administrative edit visibility will also be displayed on this page.

Active Contracts—The contract information contains the customer or company contracts currently issued to the customer and company. For contract information to appear on the Customer Details page, the Contracts module must be enabled. For information on the Contracts module, refer to the *RightNow Web eService Center 5.0 Administration Manual.*

From the Customer Details page you can perform the following functions:

- Edit customer information (refer to "Editing Customer Information" on page 8-11)
- Edit company information (refer to "Editing Company Association Information" on page 8-13)
- Change the company association (refer to "Changing Company Association" on page 8-15)
- Issue and edit customer and company contracts (refer to "Issuing Contracts" on page 8-20).
- View the incident history of the customer and the company (refer to "Viewing a Customer's Incident History" on page 8-22)
- Delete customer records (refer to "Deleting Customer Records" on page 8-23)
- Create an incident to be linked to a customer (refer to "Creating Incidents from the Customer Console" on page 8-24)
- Add customers to the database (refer to "Adding Customers to the Database" on page 8-25)

Table 8-2 describes the fields and buttons on the Customer Details page for a common configuration.

Table 8-2: Customer Details Page Default Field Descriptions

Function	Description
	Click this button to edit the customer information, including the customer's first name, last name, company name, phone, and any customer custom fields that have been defined. For more information, refer to "Editing Customer Information" on page 8-11.
	Click this button to edit the customer's associated company, including the company name, company contact, Privileged Access login information, answer access levels visible through Privileged Access, and any company custom fields that have been defined. For more information, refer to "Associating Customers with Companies" on page 8-12.
	Click this button to change the customer's associated company to a new company or another existing company. For more information, refer to "Associating Customers with Companies" on page 8-12.

Table 8-2: Customer Details Page Default Field Descriptions (Continued)

Function	Description
Contracts	Click this button to issue or edit customer or company contracts. For more information, refer to "Issuing Contracts" on page 8-20.
History	Click this button to view all of the questions the customer has submitted. You can also view all of the company incidents. For more information, refer to "Viewing a Customer's Incident History" on page 8-22.
Delete	Click this button to remove the customer record from your database. For more information, refer to "Deleting Customer Records" on page 8-23.
New Incident	Click this button to create a new incident associated with the customer you are viewing. You can also apply the incident to any support contracts currently issued to the customer. For more information, refer to "Creating Incidents from the Customer Console" on page 8-24.
Contact First Name	This is the customer's first name.
Contact Last Name	This is the customer's last name.
Email Address	This is the email address that the customer entered on the Edit My Profile page on the end-user pages. The email address is used in the customer's incidents.
User ID	This is the ID the customer entered on the Edit My Profile page on the end-user pages. Customers need their user ID for all restricted functions, including My Stuff and Ask a Question. The ID can be an email address, name, or any combination of numbers and characters but cannot contain spaces or double quotes.
Password	This is the value that the customer entered on the Edit My Profile page on the end-user pages. Customers need their password for restricted functions, including My Stuff. Passwords can be any combination of numbers and characters but cannot contain spaces or double quotes.
Company Association	This is the company that the customer is associated with. Not all customers are associated with a company; however, associating customers with a company enables all the questions submitted by employees of that company to be accessed together. For more information, refer to "Associating Customers with Companies" on page 8-12.
Company Contact	This is the name of the company contact person. This is most often the point of contact who receives official notices and correspondences.
Company ID	The company ID is needed to associate a customer with a company. Depending on how your site is configured, customers must know the company ID and password to be associated with their company when they create an account. Only CSRs and administrators can create a company ID. The ID can be an email address, name, or any combination of numbers and characters but cannot contain spaces or double quotes. **Note: This is a unique field.**

Table 8-2: Customer Details Page Default Field Descriptions (Continued)

Function	Description
Company Password	Company password is needed to associate a customer with a company. Depending on how your site is configured, customers must know the company ID and password to be associated with their company when they create an account. Company password cannot be specified from the end-user side of RightNow; it must be assigned to the company by a CSR or administrator. The password can be any combination of numbers and characters but cannot contain spaces or double quotes.
Access Levels	This field displays the access levels of the answers that can be viewed from the Answer page after the customer has logged in. Only customers associated with a company will have access to answers with an access level other than Everyone. The knowledge base engineer will set the access level for privileged access after the incident is proposed as an answer.
Active Contracts	This section displays the customer or company contracts currently issued to the customer and company. The Contracts module must be enabled for this field to appear. For more information on contracts, refer to “Issuing Contracts” on page 8-20 or the *RightNow Web eService Center 5.0 Administration Manual.*

Procedures for the functions you can perform from the Customer Details page follow in the order the buttons appear at the top of the page. You can also access any of the functions from the Select Action drop-down menu on the Customer Console.

Editing Customer Information

The fields displayed on the Edit Customer page depend on how your RightNow administrator has configured your site. Customer custom fields with administrative edit visibility will appear on this page and can be updated. Default customer information includes the customer's email address, first and last name, user ID, and password. (For information on creating customer custom fields, refer to the *RightNow Web eService Center 5.0 Administration Manual*.)

To edit customer information:

1. From the Customer Console, click [Select Action] next to the appropriate customer record and select Edit Customer.

Note: You can also double-click the customer record on the Customer Console to open the Edit Customer page.

Path: > [Select Action] ***>Edit Customer***

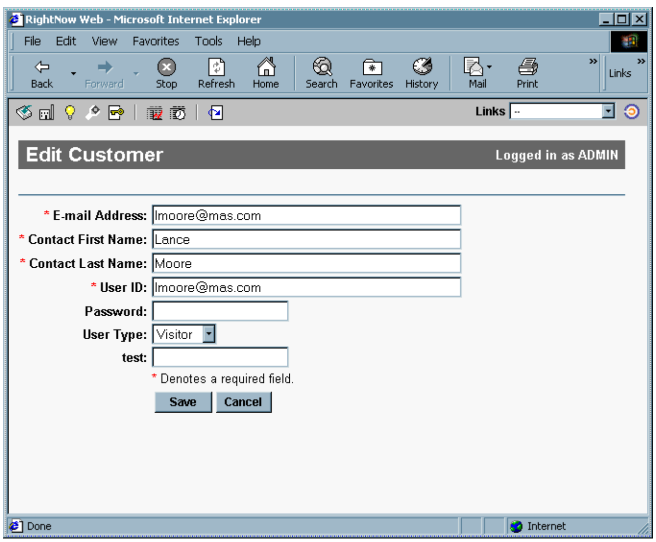


Figure 8-3: Edit Customer Page

Note: Required fields are flagged with an asterisk (*).

The fields on the Edit Customer page are described in Table 8-2, "Customer Details Page Default Field Descriptions," on page 8-8.

2. Make the necessary changes and click [Save]. You will return to the Customer Details page.

Associating Customers with Companies

Company association is a RightNow Web eService Center 5.0 feature that allows you to group customers under a “company umbrella.” This is useful when you have several customers from the same company accessing your support site. For example, suppose several employees from the same company are submitting questions to your support staff. By grouping the employees under a common company ID, both you and the employees can keep better track of the incidents submitted by the company as a whole rather than individually.

From a CSR standpoint, company association is effective when viewing a customer’s incidents (refer to “Viewing a Customer’s Incident History” on page 8-22). Through the History feature you can view all of the incidents for the company that the customer is associated with. The incidents submitted by other employees of the company will be visible without having to select those customers individually, allowing you to track a specific company’s issues and see trends or problem areas.

Changed

Your customers also benefit from company association. After logging in, customers can access Privileged Access answers when searching the knowledge base; customers can also log in to My Stuff to view all incidents for their associated company. Refer to the *RightNow Web eService Center 5.0 Administration Manual* for details.

Note: For customers to be able to view company incidents, the ID Type in the My Stuff—Questions view can be set to Customer ID with RNW User Interface>My Stuff>Questions>MYQ_VIEW_COMPANY_INCIDENTS enabled. The ID Type can also be set to Company ID.

Procedures for editing company details and changing a customer’s company association are included in the next sections:

- “Editing Company Association Information” on page 8-13
- “Changing Company Association” on page 8-15

Editing Company Association Information

You can modify company association information, including company name, Privileged Access login information (company ID and password), contact name, and the access levels of the answers viewable after a customer has logged in. Company association information is stored separately from customer information, so any changes made here will affect all customers associated with this company. For more information on Privileged Access, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

To edit company association information:

1. Click Select Action next to the appropriate customer record and select Edit Company.

Path: > Select Action ***>Edit Company***

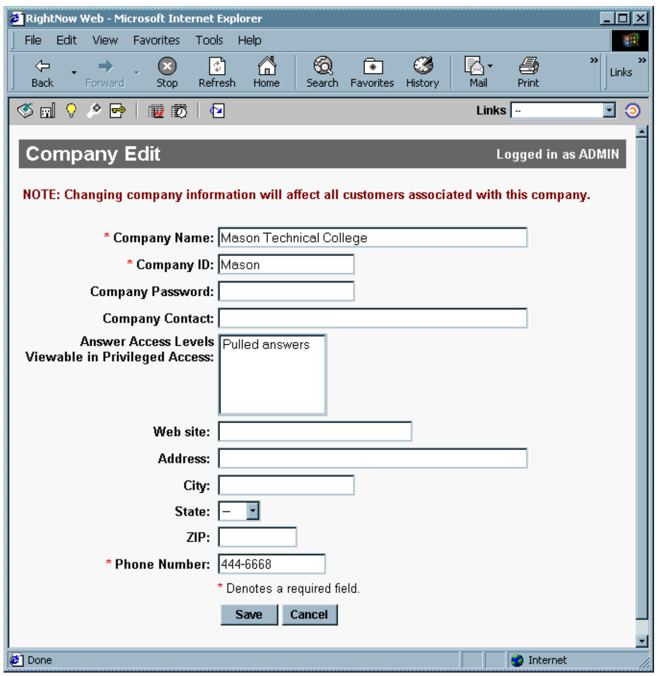


Figure 8-4: Company Edit Page

2. Modify the information as necessary, referring to Table 8-3 for field descriptions.

3. Click 

to save the company association information and return to the Customer Details page.

Table 8-3: Company Edit Page Field Descriptions

Field	Description
Company Name	This required field is the name of the company that this customer is associated with.
Company ID	The company ID is needed to associate a customer with a company. Depending on how your site is configured, customers must know the company ID and password to be associated with their company when they create an account. The company ID must be assigned by a CSR or administrator. The ID can be an email address, name, or any combination of numbers and characters but cannot contain spaces or double quotes. **Note: This is a unique field.**
Company Password	Company password is needed to associate a customer with a company. Depending on how your site is configured, customers must know the company ID and password to be associated with their company when they create an account. Company password cannot be specified from the end-user side of RightNow; it must be assigned to the company by a CSR or administrator. The password can be any combination of numbers and characters but cannot contain spaces or double quotes.
Company Contact	This field contains the name of the person who will be the primary company contact. This field is not used by RightNow, but can be used for general purposes (for example, when your organization needs to contact a company about administrative issues or with general announcements).
Answer Access Levels Viewable in Privileged Access	This field contains the access levels of the answers that the customer can view from the Answer page after they have logged in. Press **Ctrl+ left mouse button** or **Shift+left mouse button** to highlight more than one access level.

Changing Company Association

By changing the company association for customers, you can add customers to different companies and modify the structure of your customer and company relationships. You have three options when changing company association: delete the customer's company association, change a customer's association to a new company, or change the customer's company association to an existing company. Procedures for all three options follow.

To delete the company association:

1. Click [Select Action] next to the appropriate customer record and select Change Company.

Path: > [Select Action] >***Change Company***

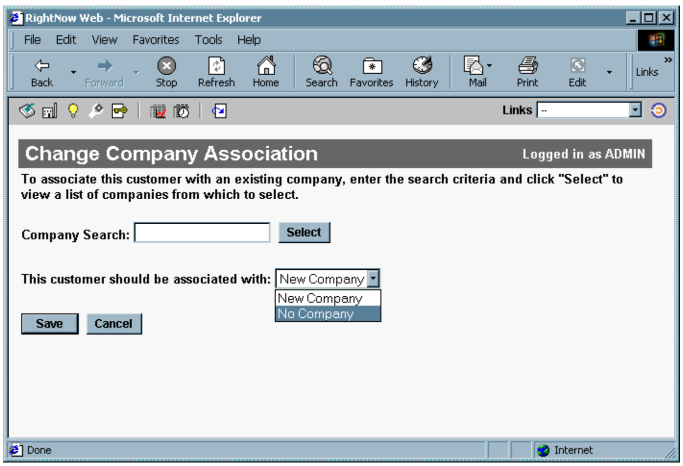


Figure 8-5: Change Company Association Page

2. Select No Company from the drop-down menu and click [Save]. You will return to the Customer Details page.

To change the company association to a new company:

1. Click Select Action next to the appropriate customer record and select Change Company.

Path: > Select Action >***Change Company***

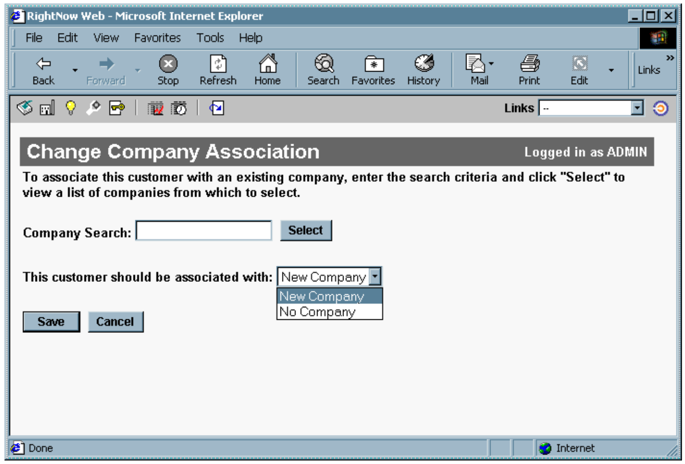


Figure 8-6: Change Company Association to a New Company

2. Select New Company from the drop-down menu and click Save. You will open the Company Information page where you can fill in the details for the new company.

Path: > Select Action > ***Change Company>New Company>*** Save

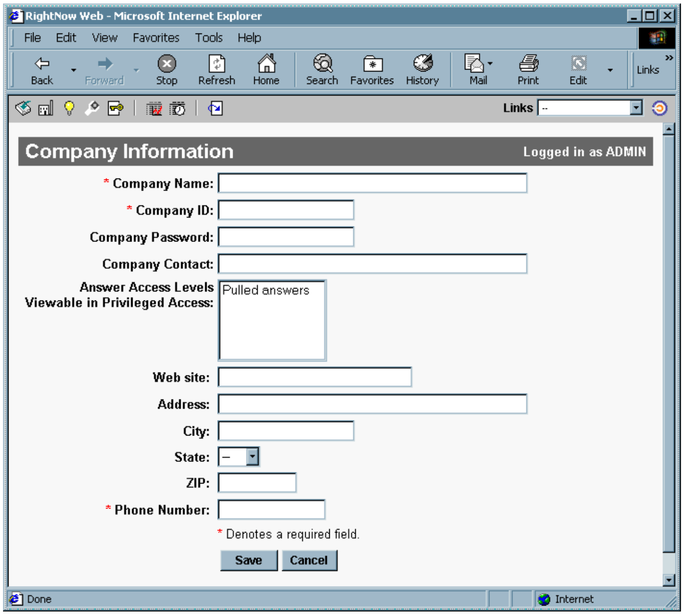


Figure 8-7: Company Information Page—New Company Information

3. Fill in the company association fields. (Refer to Table 8-3, "Company Edit Page Field Descriptions," on page 8-14 for field descriptions.)

   Note: Company Name is not a unique field, but Company ID is unique. You can have the same company with different company IDs to distinguish one from the other. For example, you may have a company that has offices in different states. The company name would be the same, but the company ID would be different.

4. Click Save to save the new company information and return to the Customer Details page.

To change the company association to an existing company:

1. Click Select Action next to the appropriate customer record and select Change Company.

Path: > Select Action >***Change Company***

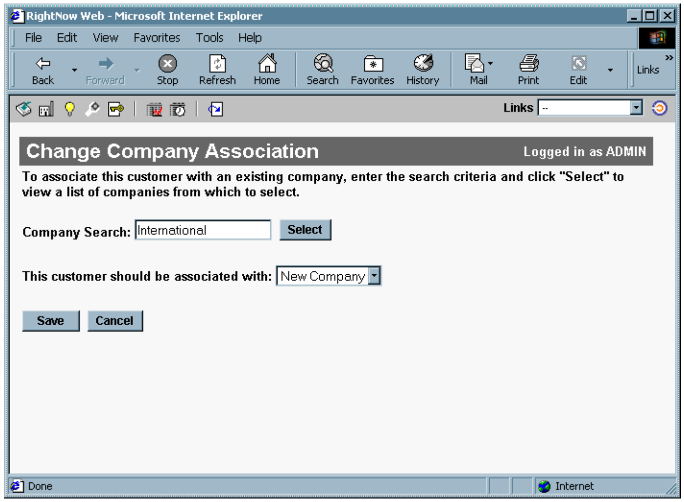


Figure 8-8: Change Company Association Page—Company Search

2. Type the name of the company in the Company Search field and click Select. This will populate the drop-down menu with the available companies matching the criteria you specified. You can enter as little or as much of the company name as you want.

   For instance, if you want to see if the company "RightNow Technologies" already exists in some form, type `right` in the Company Search text box and click Select. This will populate all companies beginning with "right" in the drop-down menu. This search feature is useful when there are several companies in the database with similar names.

   Note: Company search is not case sensitive.

Path: > Select Action > ***Change Company*** > Select

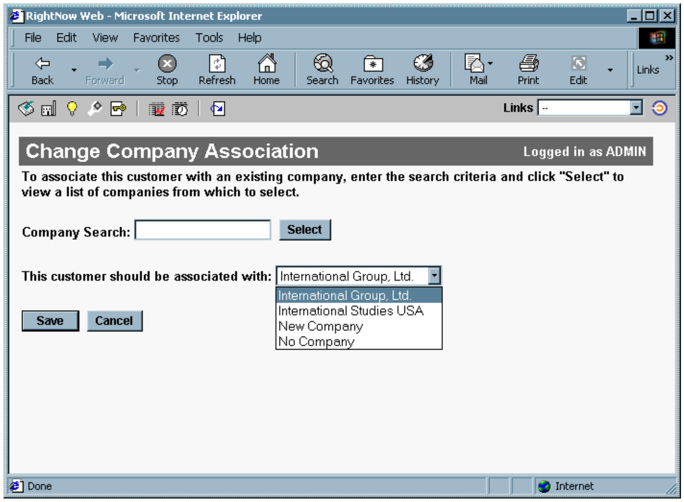


Figure 8-9: Change Company Association—Selecting a Company

3. Select the company from the drop-down menu and click Save. You will return to the Customer Console.

Issuing Contracts

If your RightNow administrator has enabled the Contracts module, one of your duties will be to issue customer and associated company contracts. With the Contracts module enabled, customers can submit questions only if they have a designated support contract within eService Center 5.0 for your company. Contracts control the amount of support your customers receive.

When viewing customer records, you can easily issue contracts as well as edit and delete active contracts. Contracts can be issued to all employees of a company or to specific customers with no company affiliation. Contracts can be defined by a number of incidents, a length of time, or a start and end date. For example, if a customer recently purchased one of your products, you could issue the customer a support contract that allows the customer to ask a certain number of questions about the new product.

Note: The Contracts module must be enabled for 

and the active contracts information to be displayed on the Customer Details page. For information about configuring the Contracts module, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

To issue a customer or company contract:

1. From the Customer Details page, click **Contracts** .

Path: > Select Action > ***Display Customer*>** **Contracts**

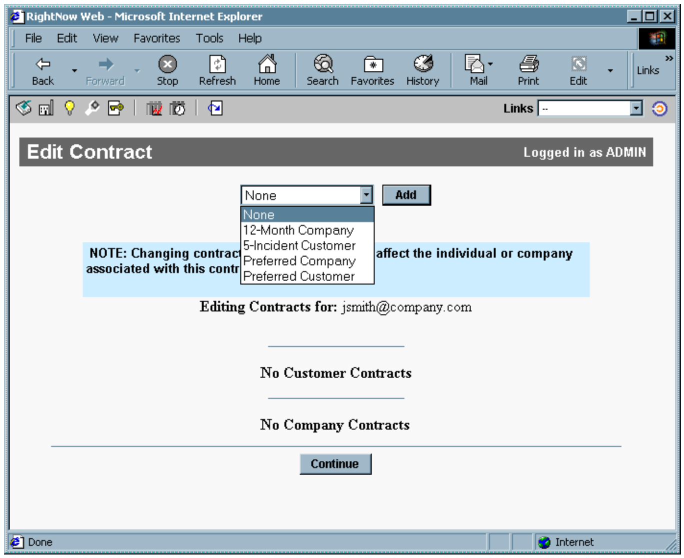


Figure 8-10: Edit Contract Page—Issuing Contracts

2. Select a contract from the drop-down menu and click **Add**. Repeat this step to add additional contracts.

   Note: Changing contract information on the Edit Contract page affects only the customer or company whose record you are currently viewing.

3. Click **Continue** to return to the Customer Details page.

Viewing a Customer's Incident History

RightNow keeps track of all incidents submitted by each customer. If a customer has a company association, you can view all incidents for that company as well. This record of incidents enables you to track both the customer's and company's issues to easily identify any unresolved incidents and their statuses. You can also quickly determine trends or problem areas for a customer and then tailor your support to address those issues.

The History feature also helps you eliminate duplication in your incident database. Occasionally, two employees from one company will submit questions on the same issue. With the History feature, you can check for duplicate incidents, thus eliminating the possibility of two CSRs working on the same issue.

To view a customer's incident history:

1. Click Select Action next to the appropriate customer record and select History.

Path: > Select Action ***>History***

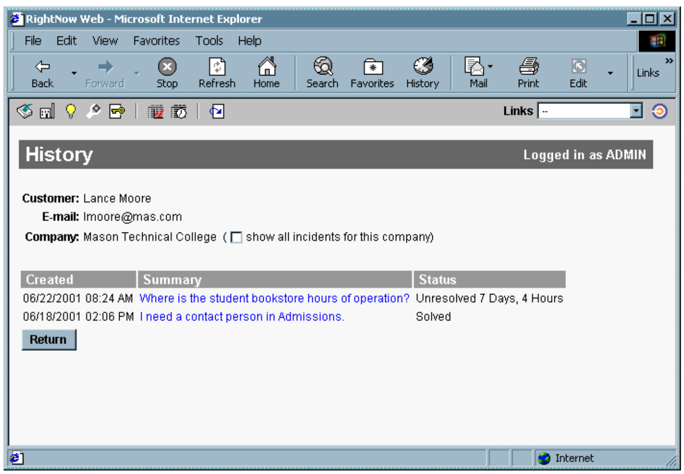


Figure 8-11: History Page

The History page displays a record of the customer's incidents, including the date the incident was created, the incident summary, and the current status. (If the incident is unresolved, the length of time is displayed as well.) The most recent incident is displayed first.

2. To show all incidents for the customer's associated company, select (show all incidents for this company) .

3. Click Return to return to the Customer Console.

Deleting Customer Records

There may be times when you will need to delete customer records to keep your database up-to-date. While the procedure is simple, you need to be aware of how deleting a customer record will affect incidents. All of the customer's information from your database will be deleted, and all of the customer's incidents will be orphaned. The incidents will remain in the knowledge base, but they will not be associated with any customer.

In addition to the incidents no longer being linked to any customer, they will no longer be linked to a company if they were associated with a specific company. Thus, other employees from the same company will not be able to view those incidents submitted by the customer whose record was deleted (see "Viewing Questions" on page 3-51). For these reasons, be cautious as you delete customer records.

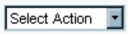
To delete a customer from the database:

1. Click Select Action next to the appropriate customer record and select Delete.
2. Click **OK** to confirm the deletion when prompted, "Are you sure you want to delete this item?"

Creating Incidents from the Customer Console

You can create an incident for a customer while viewing the customer's record. This is useful when a customer contacts your company by phone, fax, or regular mail, and you want to track the issue through eService Center 5.0. You can also apply the incident to a contract currently issued to the customer.

To create an incident from the Customer Console:

1. Click 

next to the appropriate customer record and select New Incident. You will open the Add New Incident page.

2. Refer to "Adding Incidents to the Knowledge Base" on page 4-49 for instructions on filling in the details for the new incident.

Adding Customers to the Database

RightNow eService Center 5.0 provides several ways to add customers to the database:

- Customers can create a customer record from the end-user pages.
- RightNow automatically creates a customer record (based on email address) when an end-user requests a Live chat and does not have a customer account.
- CSRs and administrators can create customer records from the Customer Console.

Adding customers from the Customer Console allows you to integrate all of your customer service interactions into RightNow. For example, any existing customers or customers who have contacted you from outside the Web can be added to your RightNow customer database. This ensures that your customer database will reflect the customers doing business with your company.

Customers can also create customer accounts unless your RightNow administrator has disabled this feature. As described in Chapter 3, “End-User Pages,” customers are prompted for their user ID and password when they try to access any restricted functions, such as asking a question or accessing My Stuff. For details on how customers create accounts from the end-user pages, refer to “Creating an Account” on page 3-12. For information about preventing customers from creating customer accounts, refer to the *RightNow Web eService Center 5.0 Administration Manual*.

This section contains instructions for adding customers to the database with no company association and with a company association.

To add a customer with no company association:

1. On the Customer Console, click **New Customer**.

Path: > **New Customer**

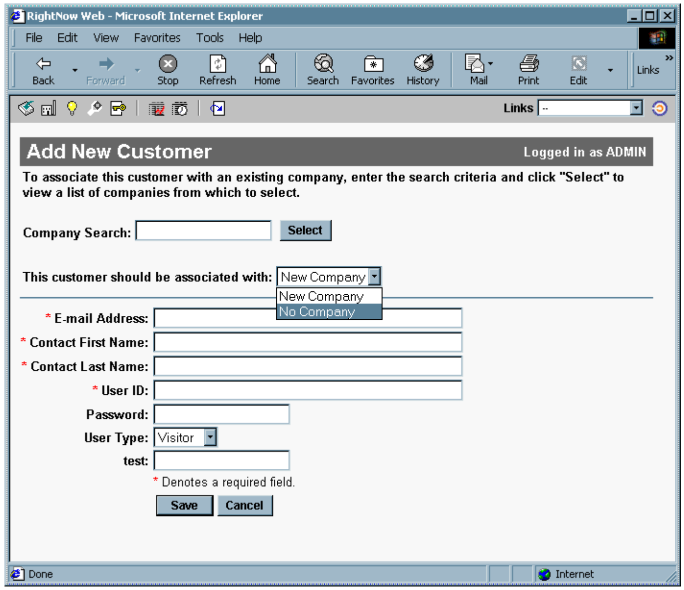


Figure 8-12: Add New Customer Page—No Company Association

2. Select No Company from the drop-down menu.

3. Fill in all required fields. (Refer to Table 8-2, "Customer Details Page Default Field Descriptions," on page 8-8 for default field descriptions.)

4. Click **Save** to save the new customer record to the database. You will return to the Customer Console.

To add a customer to be associated with a new company:

1. On the Customer Console, click **New Customer**.

Path: > **New Customer**

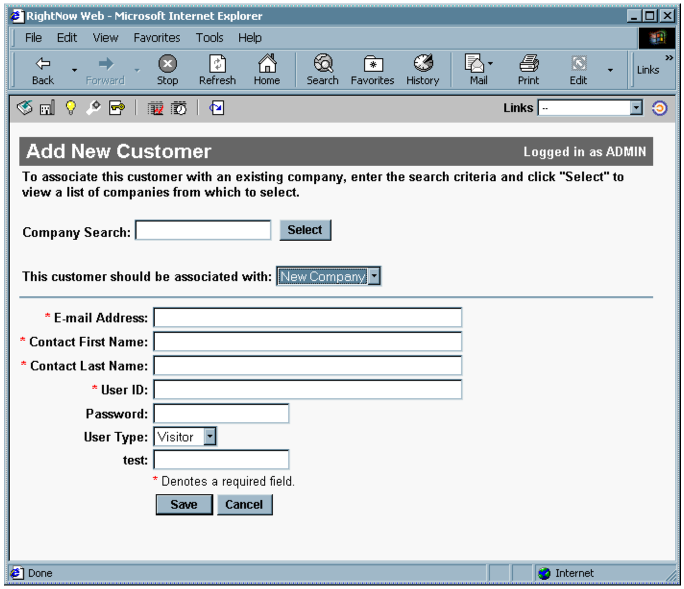


Figure 8-13: Add New Customer Page—New Company Association

2. Select New Company from the drop-down menu.

3. Fill in all required fields. (Refer to Table 8-2, “Customer Details Page Default Field Descriptions,” on page 8-8 for specific field descriptions.)

4. Click **Save** to save the new customer record and open the Company Information page where you can enter the new company information.

Path: > New Customer ***>New Company>*** Save

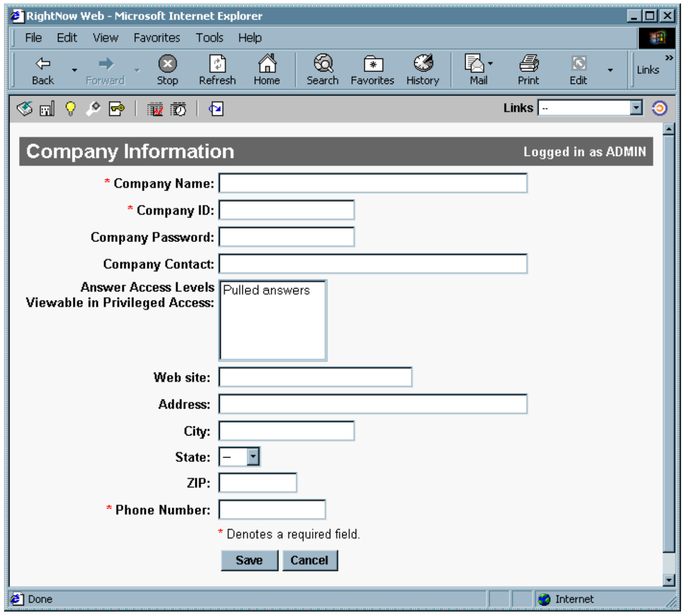


Figure 8-14: Company Information Page—Adding a Company

5. Enter all necessary information for the new company. (See Table 8-3, "Company Edit Page Field Descriptions," on page 8-14 for default field descriptions.)

6. Click Save to save the new company association information for the customer record. You will return to the Customer Console.

To add a customer to be associated with an existing company:

1. On the Customer Console, click **New Customer**.

Path: > **New Customer**

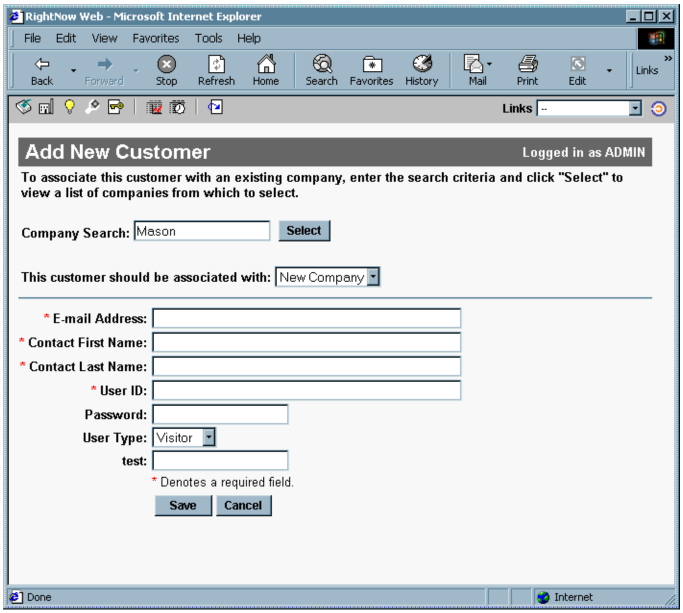


Figure 8-15: Add New Customer Page—Searching for Existing Company

Note: Information can be entered in any order; for example, you can enter the contact information before searching for a company to associate the customer with.

2. Type the name of the company in the Company Search field and click **Select**. This will populate the drop-down menu with the available companies matching the criteria you specified.

Remember that you can enter as little or as much of the company name as you want. For instance, if you want to see if the company “RightNow Technologies” already exists in some form, type `right` in the Company Search box. This will populate all companies beginning with “right” in the drop-down menu. This will help ensure that customers are associated with the correct company, especially if your database contains several companies with similar names.

Note: Company search is *not* case sensitive.

Path: > **New Customer** > **Select**

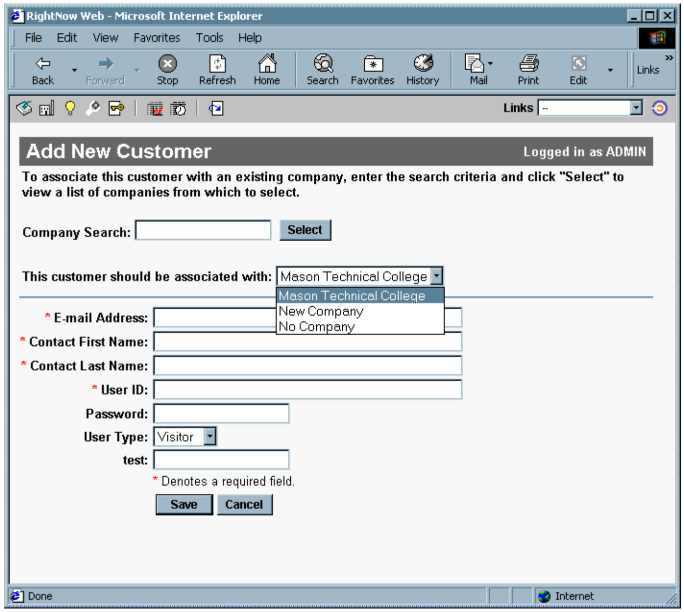


Figure 8-16: Add New Customer Page—Company Search Results

3. Select the company from the drop-down menu.

4. Fill in all necessary fields. (Refer to Table 8-2, "Customer Details Page Default Field Descriptions," on page 8-8.)

5. Click **Save** to add the customer record and return to the Customer Console.

Glossary

API—Application Program Interface. An interface that gives programmers the ability to communicate with the RightNow database. This version of the API includes functionality to create, read, update, and delete incidents, customers, and companies.

account—The settings for a staff member authorized to access RightNow Web eService Center 5.0, including login name, password, and group assignment. On the end-user side, account refers to the customer account. *See* customer account.

Administration Login page—The login page for RightNow administrators and customer service representatives accessed through a specific URL and, optionally, a password.

agent—A customer service representative who is available for a Live chat session with an end-user.

agent control window—The window where agents manage their chat sessions, view the chat status of other RightNow Live agents, and view a list of end-users in the queue. For agents with monitor privileges, they can monitor other agents' chat sessions from this window.

agedatabase—A scheduled utility that operates on the knowledge base data to maintain your dynamic answers and make searching more efficient for your customer service representatives and end-users.

aging—An automatic process that reduces an answer's solved count when the answer is not being viewed. As the solved count is lowered, the answer will move down the list of answers and be less visible to end-users.

announcements box—A white board or memo box on the Support Home and My Overview pages that can be used to display messages to end-users such as upcoming product releases or marketing information. Announcement boxes can be enabled or disabled, and the text can be customized.

answer—On the administration side of RightNow Web eService Center 5.0, answers reside on the Answer Console and may be designated for viewing by end-users. On the end-user pages, answers that have been designated for viewing by end-users appear on the Find Answers and Answer pages. Answer also refers to any knowledge base information that provides solutions to common customer service questions.

answer access—A method of controlling which public answers are visible to staff and end-users on each RightNow interface. The two default access levels are Everyone and Help.

Answer Console—The console that contains and organizes answers that can be made available for viewing by end-users. Once incidents are proposed as answers, they are available on the Answer Console, and the knowledge base engineer assigns the appropriate access and status.

answer custom fields—A field that can be added in your RightNow configuration for posting additional information about an answer. Answer custom fields can appear on a number of pages in RightNow, including the Answer Console, the Answer page, and the Edit Answer page.

answer status—A method of controlling what information becomes public and visible to end-users of your RightNow system. The default answer statuses are Public, Private, Proposed, and Review.

answer status type—The status of an answer that determines whether it can be viewed by end-users. The default answer status types are Public and Private.

answer update notification—A method for end-users to subscribe to a particular answer so they will be notified whenever the answer is updated. *See* watchlist notifications.

answer variable—A shortcut administrators can define to produce a larger string in the body of an answer. When the answer variable is inserted in the body of the answer, it is replaced with the value specified in the variable.

applet—A program designed to be executed from within another application (for example, a program that runs in a Java-enabled Web browser). Unlike an application, applets cannot be executed directly from the operating system.

<as-html>tag—A tag that signals RightNow Web eService Center 5.0 to convert any HTML code in an incident or answer into hyperlinks, formatted text, or images.

Ask a Question—A link on the Support Home page that takes end-users to the Ask a Question page. End-users can submit questions to support staff if they cannot find an answer in the knowledge base. This component of RightNow is restricted and requires end-users to have a customer account.

assignment policy—When used with workflow rules, assignment policy is a method of assigning incidents to staff members. The default assignment options are Least Workload, Manual, and Round Robin.

At command—A Windows NT/2000 command used to schedule when processes, including utilities, are automatically run.

Basic File Manager—The default version of File Manager that provides access to the most commonly modified files, including the files used to modify the end-user pages, headers and footers of the email messages, images on the end-user pages and RightNow Live, word list files, and dictionary files.

billable task—A task that a customer service representative selects when billing time through the Time Billed function. The default billable task is miscellaneous, and additional tasks can be created. *See* time billed.

boolean searching—A knowledge base search that allows end-users to connect multiple keywords using OR or AND operators.

browse—A search method on the end-user pages that provides general topics end-users can choose from and then narrows to a specific answer; a search method that allows advanced users to view the topic clusters of the knowledge base to find their own answers.

bulkdel—A utility for deleting several incidents at once.

CRM—Customer relationship management. All of the tools, technologies, and procedures to manage, improve, or facilitate sales, support, and related interactions with customers, prospects, and business partners throughout the enterprise. Essentially, any and all technologies, processes, and procedures that facilitate or support sales and marketing functions can now be identified with CRM.

CSR—*See* customer service representative.

CSS—cascading style sheet. A World Wide Web Consortium standard for style sheets capable of indicating presentation formats (such as fonts, font sizes, colors, tables, and paragraph alignment) for HTML elements.

CSV—comma separated value. A file format with commas separating one value from the next.

callback request—An option for end-users to request a telephone call from a RightNow Live agent.

canned response—*See* standard response.

category—A classification assigned to answers and incidents. All answers and incidents in your knowledge base can be classified under a single category, and sub-category and answers can be classified under multiple categories.

chat session—A real-time, two-way dialog between an end-user and one or more RightNow Live agents. *See* RightNow Live.

clipboard—A function on the Incident Console for responding to, forwarding, or deleting more than one incident at a time.

clone—To create an exact copy of an existing interface.

clustering—A process that implements an innovative combination of cutting-edge technologies to group your knowledge base into clusters of related answers and label each cluster group with keywords that define those answers. Also called *data mining.*

co-browse—A function in RightNow Live that enables an agent to initiate a collaboration session to guide an end-user through Web pages using the mouse pointer to demonstrate actions. Also called *RightNow Live collaboration*.

company association—A feature for associating a customer with a specific company. Company association links the incident history of the customer and company, allowing customers and customer service representatives to better track the incidents submitted by a company as a whole rather than individually. Company association also enables customers to view any privileged access answers designated in their customer record. *See also* privileged access answers.

company custom field—A field that can be added in your RightNow configuration for gathering additional information about the companies in your database. Company custom fields can appear on a number of pages, including the Customer Console and Customer Details page. Company custom fields can also be included on the Incident Console as search and display format criteria.

complex expression—A search technique that enables end-users and staff to search for words or phrases when they know only a portion of them. This technique supports wildcard searching using an asterisk (*) at the end of a word or partial word. Word stemming and logical operators are supported. This technique is available on the end-user pages and the Answer and Incident Consoles. *See also* word stemming and logical operators.

conference—A RightNow Live function that enables an agent to conference another agent into the current chat session.

Configuration Editor—A menu on the Management and Configuration page for accessing the Settings, Configuration Wizard, Message Bases, and File Manager to configure and customize your RightNow interface.

configuration settings—All of the settings accessed from the Configuration Editor to configure and customize your interface. These settings are located in the .CFG directory and are unique to each interface.

Configuration wizard—An interactive utility for customizing and configuring RightNow Web eService Center 5.0, including Outgoing Email, Support Home, Answers, My Stuff, Security, Incidents, and Agedatabase Utility. The Configuration wizard is automatically invoked after installation, but can be accessed at any time from the Management and Configuration page.

context sensitive answers—A subset of SmartAssistant that enables you to construct special Related Answer links from any Web page to provide additional information to your Web site visitors.

contract instances—The actual contract issued to the end-user or company (based on a contract template). When contract templates are associated with an end-user or a company, a unique instance of the contract is created.

contract rules—Rules that determine how contracts are automatically issued to end-users and companies. If a contract does not exist for the end-user or the end-user's contract has expired, the contract rules are applied to the incident, possibly creating a new contract based on the rule criteria.

contract template—An element of the Contracts module for defining the amount of support an end-user receives. You define the templates and then issue contracts to end-users and companies based on the templates. *See* Contracts.

contract verification fields—Fields you can require end-users to complete to determine if they have a valid support contract. You define the fields end-users must fill in before they can ask a question.

Contracts—A module for controlling the amount of support your end-users receive. When the Contracts module is enabled, end-users can submit questions only if they have a designated support contract within RightNow Web eService Center 5.0 for your company.

cookie—Information that is stored by the server on the client side of a client/server communication. Typically, a cookie records user preferences when accessing a particular site. RightNow uses cookies for both end-users on the end-user side and administrators and customer service representatives on the administration side. Cookies must be enabled in the individual's Web browser to take advantage of this feature.

corner GIFs—Rounded images that make the corners of the tabs on the end-user pages. The color of these images can be updated to the current colors in the enduser.css by running the *imgupd* utility.

c**rontab**—A UNIX command used to schedule when processes, including utilities, are automatically run.

crontabfile—A file that contains and stores the scheduled processes.

custom reports—One of the management reports you can generate that allows you to combine data from selected tables in RightNow to create unique reports.

customer—A Web user who accesses and uses a site on which RightNow Web eService Center 5.0 is installed; any customer who has a customer account and associated record in the customer database. Also called *end-user*.

customer account—An account consisting of a user ID and password that allows your customers (end-users) to access restricted functions in RightNow, including Ask a Question, My Stuff, and Privileged Access answers. Each customer account creates a record in the customer database accessed from the Customer Console.

customer custom field—A field that can be added in your configuration for gathering additional information about the customers in your database. Customer custom fields can appear on a number of pages, including the Customer Console and the Customer Details page. Customer custom fields can also be included on the Incident Console as search and display format criteria.

Customer Console—The entry point to the customer database. Staff members use the Customer Console to view customer information supplied by customers when they create an account. Additional actions that a staff member can perform from the Customer Console include adding customers, editing customer records, associating new and existing customers with companies, changing company information, issuing contracts to customers, and designating answer access levels for viewing privileged access answers.

customer info—A button on certain Incident Console pages for viewing a specific customer's information.

customer mailing list—A custom report you can create and generate that lists customer email addresses.

customer service representative—A staff member responsible for responding to and solving incidents and maintaining customer information.

Data Management wizard—A wizard that assists you in importing or exporting information into or out of the RightNow database.

data mining—The exploration and analysis of large quantities of data to discover meaningful patterns and rules. Data mining enables you to turn raw data into information you can use to gain a marketplace advantage.

data type—The type of custom field specified when creating company, customer, incident, and answer custom fields. Data types consist of menu, radio, integer, date, date / time, text field, and text area fields.

database—The tables and data structure in RightNow Web eService Center 5.0 that maintains, stores, and retrieves information.

dbaudit—A utility that performs any RightNow upgrade. This utility also configures the database and updates keywords and phrases when you change a word list file. The *dbaudit* utility can also be used to view database schema.

dbstatus—A scheduled utility that escalates incidents based on escalation rules; *dbstatus* also sends out scheduled reports and watchlist notifications. *See* watchlist notifications.

dialog box—An on-screen message box that conveys or requests information from the end-user.

discussion thread—The list of all activity on an incident, including updates made by the end-user, responses entered and / or sent by customer service representatives, conversations between the end-user and staff, and notes about the incident made by customer service representatives (never visible to end-users). Discussion thread provides a permanent history of the incidents in your knowledge base.

display format—The fields that show the incident details on the Incident Console, the answer details on the Answer Console, or the customer details on the Customer Console. The fields specified in the display format section of RightNow views contain the actual information from each incident, answer, and customer record. Display format fields can also be specified for certain end-user pages views.

display position—The position where a new answer appears on the Find Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom.

distribution list—A mailing list of non-staff member email addresses used for report subscriptions.

drill down—A reporting feature that allows you to access another level of detail. Drilling down breaks down groups by staff members, for example, as though you were generating another report. Drill down is also available in views. *See* group by criteria.

eCRM—Web-based Customer Relationship Management. *See* CRM.

email answer—A button on the Answer page that end-users can click to forward an answer to the email address they specify.

email link—A link that automatically opens the end-user's email program and populates the "To" field with the address you specify. The end-user activates the link by clicking on the email link, which is usually underlined and set in a different color.

email response management—A level of customer service in RightNow Web eService Center 5.0 that intelligently routes questions to the appropriate staff member (based on workflow rules) and automatically responds to incoming requests.

e-service—Web-based customer service.

end-user—*See* customer.

end-user pages—All of the pages in RightNow Web eService Center 5.0 that end-users can access to look up answers, view their account information, submit a chat request, and ask a question.

event handlers—RightNow's external event interface that allows you to define custom processes for managing your knowledge base incidents. For example, if you need to maintain your own incident database, you can create an event handler that automatically copies new incidents from RightNow to your external database. These types of event handlers are ideal for building real-time interfaces between RightNow and help desks, call centers, data mining, or reporting systems.

escalation rules—Customized rules set by the administrator that define procedures for escalating incidents within the system to take action should certain situations or issues arise. Escalation rules are applied to new and updated incidents.
See also dbstatus.

Expanded File Manager—A version of File Manager that provides additional access to the enduser and mail directories where you can further modify the end-user pages and edit the format of the email messages sent to end-users. Modifications made to files accessed through the expanded version are not carried over to subsequent versions of RightNow.

external events—RightNow supports the following types of external events:

Insert Incident Events—This type of event occurs whenever a new incident is created.

Update Incident Events—This type of event occurs whenever a customer or a staff member updates an existing incident.

Delete Incident Events—This type of event occurs whenever a customer or a staff member deletes an existing incident.

Insert Customer Events—This type of event occurs whenever a new customer is created.

Update Customer Events—This type of event occurs whenever a customer or a staff member updates existing customer information.

Delete Customer Events—This type of event occurs whenever an existing customer is deleted.

file attachment—A file that is permanently attached to an incident or sent with incident responses. Attachments can also be added when editing or responding to an incident, but not saved as part of the permanent incident record.

File Manager—A feature that provides access to modifiable files in RightNow. File Manager is available in two versions: Basic and Expanded. Through a graphical user interface, administrators can modify files used to customize a site's end-user pages, email messages sent to customers, images, word lists, and dictionary files used in RightNow Web eService Center 5.0.

Find Answers—A link on the Support Home page that takes end-users to the Find Answers page where they can search the knowledge base. Drop-down menus and the search text box enable end-users to narrow their search to find the answers they need. If enabled, end-users can also use Browse to search the knowledge base by topics. From the Find Answers page, end-users can click on an individual answer to view the complete details.

firewall—A security system intended to protect an organization's network against external threats, such as hackers, coming from another network such as the Internet. RightNow Live can be configured with or without a firewall.

form assistance—A subset of RightNow Live collaboration (co-browse) that allows end-users to request a Live chat from a page outside of RightNow Web eService Center 5.0 and push a partially completed form to the agent's computer for assistance. *See* co-browse.

full access—The default profile that allows staff members full access to all administration pages and functions.

group—A category in which staff members are placed for use in viewing the incidents assigned to members of a particular group, when assigning workflow rules for incoming email and Ask a Question requests and Live chat sessions, and for reporting purposes. Staff members are assigned to a primary group and may also be assigned to one or more secondary groups.

group by criteria—An option in manage views that provides a more organized view of the Incident, Customer, or Answer Console. You can define up to five levels for grouping by criteria; the more levels you use, the finer the detail will be. For each additional level you define, you will see more detail as incidents, customers, or answers are broken down into smaller groups.

Help—An answer access level for context sensitive answers. Help answers are not visible to end-users except through special hyperlinks. *See* context sensitive answers.

HTML—hypertext markup language. A formatting syntax used to make Web pages. HTML documents are read by a Web browser on the user's machine (client-side). Tags are used to format text, reference images, and create hyperlinks. A tag consists of an opening and closing tag (for example, and).

hyperlink—A connection between an element in an incident, such as a word, phrase, symbol, or image, and a different element in a document, chart, images table, or Web site. The end-user activates the link by clicking on the linked element, which is usually underlined and set in a different color.

IMP file—Import file. A data file with an extension of .imp that is used by the *kimport* utility to map values in the CSV file to columns in the RightNow database.

imgupd—A utility that updates the color of the corner gifs used in making the tabs on the end-user pages to match the colors in the enduser.css. This utility must be run if any modifications are made to the colors in the *enduser.css.*

icon toolbar—The toolbar on all administration pages that allows quick access to the Incident, Customer, Answer, Live, and Reports Consoles; the Management and Configuration page; the Personal Settings page; and Scheduled Reports.

incident—Any question or request for help from an end-user through Ask a Question or email inquiries, Live chat sessions, site or answer feedback, or inquiries from external sources using RightNow's published Application Program Interface; a question or issue that has been entered into the Incident Console and, once solved, can be proposed as an answer.

Incident Console—A group of related pages for adding, editing, viewing, managing, and responding to incidents. The Incident Console tracks all incidents generated by customer service representatives or by your end-users through Ask a Question inquiries, email requests, Live chat sessions, or site and answer feedback.

incident custom field—A field that can be added in your RightNow configuration for posting additional information about an end-user's issue or question. You can choose to have incident custom fields appear on a number of pages, including Ask a Question, Incident Details, and the Editing Incident pages. Incident custom fields can also be included on the Incident Console as search and display format criteria.

incident details—A page in RightNow that contains information about a specific incident. From this page staff members can view incident details, edit and delete incidents, view customer information and history, assign the incident to a staff member, set the incident status, and propose an answer.

incident locking—An automatic lock placed on an incident whenever someone is updating, editing, or responding to the incident. If another person (end-user or staff member) attempts to update, edit, or respond to that incident at the same time, a warning will be displayed.

incident status—The current state of an incident. The four default incident statuses in RightNow Web eService Center 5.0 are Unresolved, Solved, Updated, and Waiting. Additional statuses can be defined and assigned a default status type.

incident status type—The status of an incident on the Incident Console. Default incident status types are Solved, Unresolved, and Waiting.

indexing—A process in which the text of an answer or incident is parsed and indexed into keywords and phrases. These keywords and phrases are used to build the answer and incident phrases table that is used during text searching. When an answer is created or updated, the keywords, summary, question, and answer fields are parsed and indexed to create one-, two-, and three-word phrases. When an incident is created or edited, the summary and discussion thread (issue / response) fields are parsed and indexed to create one-word phrases.

interface—A unique set of RightNow administration and end-user pages that allows users to interact with a single knowledge base. The interface name determines the uniform resource locator for the Web site, the name of the RightNow executable, and the .CFG directory name.

Interface Manager—A utility for managing multiple interfaces in the same RightNow knowledge base.

Java virtual machine (JVM)—A software program that interprets Java-compiled programs into a format your computer's hardware and operating system can understand.

kexport—A utility for exporting data from your Rightnow database, either single tables or an entire RightNow database.

kimport—A utility for importing data, either single tables or an entire RightNow database, into your RightNow database.

knowledge base—Information, including customers, incidents, and answers, maintained and presented by RightNow in a meaningful way; the entire set of questions and answers. The knowledge base stores topics, which are predefined sets of search criteria. Knowledge base also refers to the interrelationship between answers.

knowledge base engineer—The staff member responsible for populating and maintaining the answers in the knowledge base. Responsibilities may include identifying when additional answers should be added, editing proposed answers, and reviewing existing answers to keep them current.

langcvt—A utility for changing the language pack in RightNow Web eService Center 5.0. This utility converts the message bases and pre-populated knowledge base to the new language.

language—The language for a specific interface that determines, in part, what answers are visible for viewing by end-users.

least workload—An assignment policy that compares the total number of incidents assigned to each staff member in a particular group, and then assigns new incidents to those staff members with the fewest incidents assigned to them. When determining who has the least number of incidents assigned, all groups that staff members belong to are considered.

Live Assistance—A link on the Support Home page that takes end-users to the Live Assistance page where they can submit requests to chat with a RightNow Live agent or have an agent call them back. This component of RightNow Web eService Center 5.0 provides two-way, real-time chat and telephone callback for those companies that require a live support presence.

Live Chat window—The window where agents engage in chat sessions with end-users and access chat management tools for answering questions and solving problems during Live chat.

Live Console—An icon on most administration pages for logging in as a RightNow Live agent.

logical operators—The words and symbols, AND (+) and logical NOT (-), that can be used in most search techniques in eService Center 5.0 to explicitly find answers that have a word (+) or that do not have a word (-).

Login—A tab on the end-user pages that end-users can click to log in to ask a question, view and edit all of the questions they have submitted, view and edit their search preferences and account and contact information, and view Privileged Access answers.

mailing list—A list of external email addresses for sending scheduled reports to a group of non-staff members.

manage views privileges—An option in a staff member's security profile that allows the staff member to modify or create views.

Management and Configuration page—The main configuration page in RightNow Web eService Center 5.0 where administrators and other staff members can access the configuration settings, message bases, and customizable menus necessary to configure and customize their RightNow application.

management reports—The full line of predefined, system-generated reports available in RightNow.

manual—An assignment policy requiring that a designated staff member assign incidents to staff members from the Incident Console.

message bases—A component in RightNow that provides international language support and allows you to customize the headings, labels, and text on RightNow pages.

meta-answer—A high-level answer used to group similar answers. Meta-answers are language and access specific, and contain all answers in all forms to one question. Meta-answers are used only with multiple languages or privileged access.

monitor privilege—A security profile privilege that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.

msgtool—A utility for creating a configuration report for your site or for changing configuration settings when you have made an error in one of the settings that subsequently locks you out of the Configuration Editor.

My Stuff—A link on the Support Home page that takes end-users to their personal account information. From this area end-users can view and update all the questions that they have previously submitted and view any notifications for answers to which they are subscribed. They can also view and edit their search preferences and account and contact information. This component of RightNow Web eService Center 5.0 is restricted and requires end-users to have a customer account.

mySQL—A multi-user, multi-threaded SQL database server. MySQL is a client/server implementation that consists of a server daemon *mysqld* and many different client programs and libraries. The main goals of MySQL are speed, robustness, and ease of use. *See also* SQL.

natural language—Any approach that accepts and correctly handles human language. For example, English, French, and Chinese are natural languages; computer languages, such as FORTRAN and C, are not. RightNow provides natural-language technology for searching the knowledge base.

OCI—Oracle Call Interface. An application programming interface that allows you to create applications that use the native procedures or function calls of a third-generation language to access an Oracle database server and control all phases of SQL statement execution. OCI allows you to manipulate data and schemas in an Oracle database using a host programming language such as C. It provides a library of standard database access and retrieval functions in the form of a dynamic runtime library (OCI library) that can be linked in an application at runtime. This eliminates the need to embed SQL or PL/SQL within 3GL programs.

ODBC—Open Database Connectivity. A standard or open application programming interface for accessing a database. By using ODBC statements in a program, you can access files in a number of different databases, including Access, dBase, DB2, Excel, and Text. In addition to the ODBC software, a separate module or driver is needed for each database to be accessed. The main proponent and supplier of ODBC programming support is Microsoft. ODBC is based on and closely aligned with the Open Group standard Structured Query Language (SQL) Call-Level Interface. It allows programs to use SQL requests that will access databases without having to know the proprietary interfaces to the databases. ODBC handles the SQL request and converts it into a request that the individual database system understands.

operating system—The program that, after being initially loaded into the computer by a bootstrap program, manages all other programs in a computer. UNIX, Windows 2000, Windows NT, VMS, OS/2, and AIX are all examples of operating systems.

PC_ESCAPE TAG—A configuration setting for entering HTML tags. By adding HTML tags in this configuration setting, you eliminate the need to precede HTML code with the <as-html> tag.

PHP—PHP Hypertext Preprocessor is a server-side, HTML-embedded scripting language used to create dynamic Web pages. In an HTML document, PHP script (similar syntax to that of Perl or C) is enclosed within special PHP tags. Because PHP is embedded within tags, the author can jump between HTML and PHP instead of having to rely on heavy amounts of code to output HTML. Because PHP is executed on the server, the client cannot view the PHP code. PHP can perform any task any CGI program can, but its strength lies in its compatibility with many types of databases. Also, PHP can talk across networks using IMAP, SNMP, NNTP, POP3, or HTTP.

page—A Web page; a page in RightNow Web eService Center 5.0.

personal settings—A page in RightNow where staff members can change their password, their default views, and the page that opens after successfully logging in to the administration side of RightNow.

primary group—The default group that a staff member belongs to. Staff members can also belong to secondary groups. *See* group.

private—One of two default answer status types. Answers marked Private are never visible to end-users.

privileged access answers—Answers that are assigned a custom access level for viewing by certain end-users with the appropriate access level designated in their customer account. *See also* company association.

product—A classification assigned to answers and incidents based on the products offered by your company. All answers and incidents in your knowledge base can be classified under a single product, sub-product, category, and sub-category and answers can be classified under multiple products and categories.

professional services—Services provided by RightNow Technologies, including training, support, and consulting.

profile—A security mechanism in RightNow for controlling access to administration functions and for assigning staff members specific permissions.

propose answer—A function for proposing an incident to become a publicly viewable answer. A copy of the incident is created as an answer and can be viewed and edited from the Answer Console. The knowledge base engineer then determines its access level, status, language, and visibility.

proposed—One of four default answer statuses. Answers marked proposed are not visible to end-users until the knowledge base engineer changes the status to Public.

Provide Feedback—A link on the Support Home page that enables end-users to submit feedback about an organization's Web site, customer service staff, product satisfaction, or any issue pertaining to an organization's Web site or customer service.

proxy—*See* firewall.

public—One of two default answer status types. Answers marked Public may be visible to end-users depending on their access level and language.

query—A question or inquiry.

RDBMS—relational database management system. A type of database management system that stores data in the form of related tables. Relational databases are powerful because they require few assumptions about how data is related or how it will be extracted from the database. As a result, the same database can be viewed in many different ways. An important feature of relational systems is that a single database can be spread across several tables.

real time—Those operations in which the machine's activities match the human perception of time, or those in which computer operations proceed at the same rate as a physical or external process. RightNow Live provides real-time, two-way dialog with end-users.

related answers—A function that aids end-users in finding solutions to questions related to the current session history. The Related Solutions page on the end-user pages displays answers sorted by relatedness to the individual's question—those answers that appear at the top of the list are most related to the last answer the end-user viewed before clicking the Related button.

report subscriptions—A function that allows administrators to select a report to subscribe from a drop-down menu. Administrators can also make a report subscription public or private. In addition, administrators can schedule the report to be sent to a group of staff members, an individual staff member, a mailing list, an external email address, or any combination of these selections.

restricted functions—Those end-user functions in RightNow that require a valid account (user ID and password) to access. End-users must have a customer account to ask a question and to access My Stuff and Privileged Access answers.

review—One of four default answer statuses. This status is designed for answers that have been aged to a point where their solved count has reached zero or have been in the system for a predetermined period of time. Once the answer reaches zero, the answer status will be changed to Review so that a staff member can look at the data and determine if it needs tuning or should be deleted based on its current use.

RightNow Live—A component in RightNow Web eService Center for providing end-users with access to RightNow Live agents for questions and issues that require human interaction. Also called *Live chat*.

RightNow Metrics—A performance evaluation tool allowing immediate feedback on the quality and timeliness of your online interactions. Using RightNow Metrics, you can create and distribute customized surveys, including closed-incident and on-demand surveys.

RightNow Web eService Center 5.0—An automated Internet customer service and technical support solution for customer care. RightNow handles customer service requests through three modes of query: self-service, email response management, and Live chat. Also called *RightNow* and *eService Center 5.0*.

round robin—An assignment policy that alternates staff members in a group. Also called *least recently used*.

SQL—structured query language. A standardized query language for requesting information from a database. SQL was first introduced as a commercial database system in 1979 by Oracle Corporation. SQL supports distributed databases (databases that are spread out over several computer systems). This enables several users on a local area network to simultaneously access the same database.

score—A calculated value equal to the answer's solved count combined with any "fix at" positions specified for the answer in the Display Position drop-down menu on the Add New Answer page or Edit Answer page.

schema—The structure of a database system described in a formal language supported by the database management system. In a relational database, the schema defines the tables, the fields in each table, and the relationships between fields and tables.

search criteria—The values in the Field drop-down menu on the Incident, Customer, or Answer Console and the Search page on the end-user side. Options in the Field drop-down menu allow staff members to specify the search type or field that will be used when executing a text search.

secondary group—A means of identifying an additional group to which staff members can be assigned.

selection criteria—The drop-down menus at the top of the Incident, Customer, and Answer Consoles and the Search page on the end-user side that can be used to run queries for particular sets of incidents, customers, and answers. The values in the drop-down menus create the search criteria used for the initial search that runs the first time the particular page is accessed.

servlet—A process that runs on the Web server to extend the functionality of the Web server and use the processing power of the Web server.

session—The period of time an end-user spends looking for a satisfactory answer to a question. Within a session, an end-user may access more than one answer looking for an adequate solution. A session ends when one of the following occurs: an end-user responds with a 100% rating to the question “How well did this answer your question?” on the bottom of the Answer page; the end-user submits a question; the end-user exits RightNow; or two hours pass.

session tracking—A function that tracks an end-user’s current session history (that is, the pages in RightNow Web eService Center 5.0 the end-user clicked). The Session Tracking management report displays session length in terms of time and pages, page transitions, time between page transitions, and starting and ending points for sessions.

SmartAssistant—RightNow technology that assists end-users and staff in finding and suggesting possible solutions to a question or issue based on the current session history or the keywords in an incident’s discussion thread. *See also* related answers.

SmartSense—An administration feature that estimates an end-user’s emotional state or attitude based on the words and language they use when submitting an inquiry; SmartSense also estimates the end-user’s and agent’s emotional state or attitude when engaged in a Live chat.

solution—An incident / answer that is returned based on some sort of end-user query.

solved—One of three default incident status types. Incidents marked Solved have been resolved.

solved count—The method for determining where an answer will display on the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list. When an end-user clicks one of the options to “How well did this answer your question,” it directly affects the solved count. The solved count is increased for answers that are viewed, and decreased for answers viewed later in the same session. The solved count is also increased when a customer service representative uses a SmartAssistant-recommended solution when responding to an end-user’s question.

staff disable—An option to temporarily exclude staff members from new incident assignments, preventing urgent customer inquiries from being assigned to staff members who are temporarily unavailable.

staff member—Any employee who will be using RightNow Web eService Center 5.0, or anyone who will be receiving management reports.

Standalone Configuration Editor—Access to the configuration editor without going through the Management and Configuration page. Entry is made using a specific URL.

standard response—A response prepared in advance that can be sent to an end-user when responding to an incident, appended to a response by a workflow rule, or sent by a RightNow Live agent during a chat session.

status type—The current state of an answer or incident. Default answer status types are Public and Private; default incident status types are Unresolved, Solved, and Waiting.

suggested solutions—A function that suggests solutions to end-user questions when a workflow rule has been set up to append SmartAssistant suggested solutions on Ask a Question inquiries. End-users can click on a suggested solution to view that answer.

Support Home—The support central page that contains links leading to the main components in RightNow Web eService Center 5.0. This page provides end-users with quick access to the tools they need to answer their questions and receive immediate customer service.

techmail—A scheduled utility that retrieves mail from specified mailboxes (POP mailboxes). RightNow Web eService Center 5.0 then processes the mail into new incidents and routes the incidents using workflow rules.

text searching—A feature that enables end-users and staff to search using their own words instead of choosing values from specific fields. The entered text is compared to the indexed keyword phrases for answers and incidents to locate keyword phrases.

time billed—A function that allows a company to track the time spent servicing end-users’ questions and, if the company bills by the minute or by time spent on an issue, to determine how much to bill end-users.

top level view—Group By level one criteria option that formats your view to display all answers, customers, or incidents grouped by criteria you select. This display gives a visual summary of your data.

transfer—A RightNow Live function that enables an agent to transfer an end-user to another agent during a chat session.

UNIX—A multitasking operating system that originated in 1969 at Bell Labs. Written in the C Programming Language, UNIX is very portable and runs on a number of different computers. UNIX is the main operating system used by Internet host computers.

URL—universal resource locator. An example of a full URL is http://www.rightnow.com.

unresolved—One of three default incident status types. An incident marked Unresolved has been recently entered by an end-user requesting assistance or has been recently updated by an end-user requesting further assistance.

updated—One of four default incident statuses. An incident marked Updated has been updated by an end-user from My Stuff. Updated incidents have an Unresolved status type.

view—The way items are displayed on a RightNow page. A view specifies the search criteria, sort order, columns displayed, width of displayed columns, and number of incidents displayed on a particular page. You can create and edit Answer Console, Incident Console, and Customer Console views, and edit the end-user view for the Search page and My Stuff–Questions.

visibility—Answer settings (and permissions) for products and categories, answer statuses, and answer access levels that determine which interface the answers will appear on and which end-users can view them. Visibility settings also determine the pages in RightNow where custom fields will appear.

waiting—One of three default incident status types and one of four default incident statuses. An incident marked Waiting has been responded to by a staff member and is waiting for a response from the incident creator.

watchlist notifications—Emails sent to those end-users who have requested to be notified when a particular answer has been updated. *See* answer update notification.

Web browser—A software application used to locate and display Web pages. The two most popular browsers are Netscape Navigator and Microsoft Internet Explorer. Both of these are graphical browsers, which means they can display graphics as well as text. In addition, most modern browsers can present multimedia information, including sound and video, though they require plug-ins for some formats.

Web server—A computer that delivers Web pages. Every Web server has an IP address and possibly a domain name. Any computer can be turned into a Web server by installing server software and connecting the machine to the Internet.

weight (for answers)—A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search.

weight (for indexed words)—An internal value given to each indexed keyword for an answer or incident. This value is relative to a constant and is based on number of occurrences, capitalization, and location of the word (ranked high to low: keywords, summary, question, and answer field for answers; summary and discussion thread for incidents).

window—A separate viewing area on a computer display screen in a system that allows multiple viewing areas as part of a graphical user interface.

wizard—Any of several utilities in RightNow Web eService Center 5.0 for assisting administrators in setting up and configuring particular areas of their RightNow application.

wltool—A utility you manually run after you have changed one of the word list files (synonyms used to expand a search, words to exclude from a search, or SmartSense word ratings). *See* word list file.

word list file—Any of three files that can be modified to customize indexing (*nlp_exclude.txt*), text searching (*nlp_exclude.txt* and *synlist.txt*), and SmartSense emotive ratings (*smartsense.txt*).

word stemming—A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

workflow rules—Rules that can be defined to automatically route and respond to incoming inquiries, significantly decreasing the amount of time spent processing inquiries. Workflow rules can be applied to email and Ask a Question inquiries, Live chat sessions, feedback from customers, inquiries from an external source using RightNow's published Application Program Interface, and incidents created from the Incident Console.

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